NEWSPAPER

0 14302 76871 1 26

C2700-1

# Advertising Age

June 25, 1990

Copyright 1990 by Crain Communications Inc.

Crain's International Newspaper of Marketing • In Two Sections • Section 1 • $2.00 • $2.50 in Canada • £3.50 in U.K.

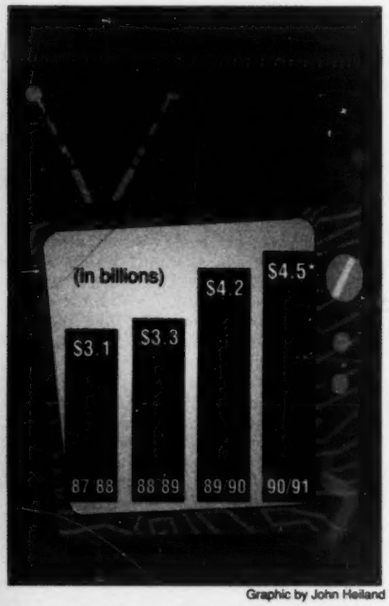
#48000000000005-DIGIT 20814
#0201909649 6#01AA02652 99GYZ
CONGRESSIONAL INFO SERVICE
SRI ACQUISITIONS
4520 EAST-WEST HWY #800
BETHESDA MD 20814

# Hollywood fuels TV upfront

**By Wayne Walley**

Hollywood's movie studios, picking up the slack from flat-spending automakers, helped ignite what will be a record $4.5 billion upfront selling season for network TV.

Ratings guarantees, expected to be one of the most volatile issues in negotiations *(see related story on Page 60)*, have been all but ignored as each network is asking for, and getting, price increases of as much as 20% on a cost-per-thousand basis.




Graphic by John Heiland

Although agency media buyers earlier said this would be a bitter and hard-fought sales period, deals were quietly and quickly completed last week in what one buyer described as "a surreptitious upfront."

"Agencies bitch to the networks, we bitch to the agencies—everyone bitches. But when it comes time for upfront, everyone folds," said an executive with a major advertiser.

Agency sources said entertainment spending is up "appreciably," maybe as much as $150 million, and would more than cover a shortfall in automotive sales.

The car companies drove the upfront market into a frenzy last year by spending more than $700 million, but they're spending less this year, perhaps $600 million to $650 million.

"Fox [Broadcasting Co.] could have sold out every avail on Thursday to the movie companies if they wanted to do that," one agency source said. Fox's new Thursday night lineup is anchored by "The Simpsons."

"No one is meeting planning costs again," said an agency executive who asked to remain anonymous. "Everyone is in an absolute snit over price increases."

ABC initially asked for CPM increases of 25% for non-auto and non-movie categories, agency sources said. At least one major agency has closed a deal with the network at 18%, said buyers who refused to name the agency.

Top-rated NBC and third-ranked CBS also were said to be asking for more than 20% in CPM increases and making deals in the midteen range.

Fox, the fourth network, was getting CPM increases ranging from 20% to 42% from the movie studios.

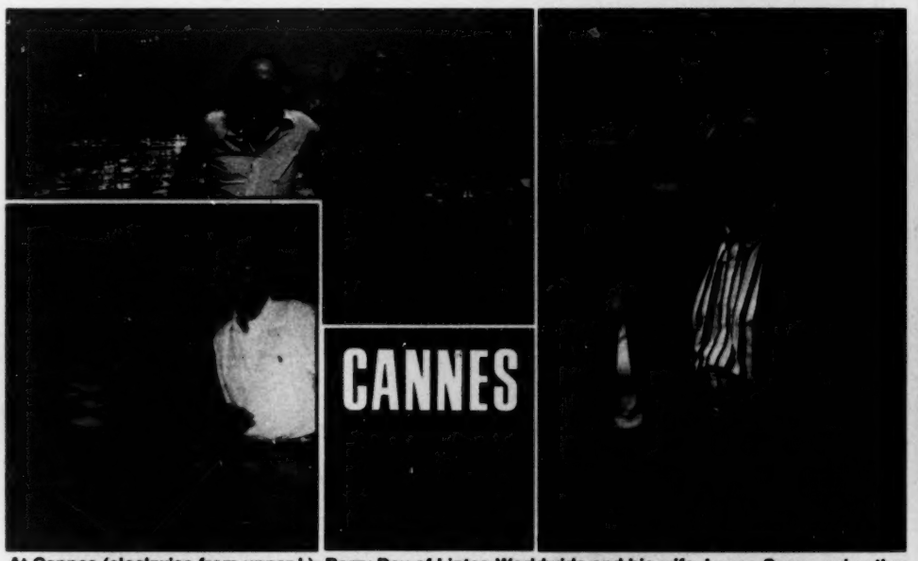
"The Simpsons," thanks to the demand, was getting as much as $300,000 for a 30-second spot, sources said.

Even though the marketplace has been tough, many say it doesn't compare with last year, when the market moved so fast deals were written in the middle of the night.

Network and agency sources now expect advance sales for prime-time programming to be near completion by the end of this week, with network news, daytime and late-night sales to follow quickly.

"Stuff is happening, but there isn't the same panic as last year,"

*(Continued on Page 56)*




Photos by Laurel Wentz

**At Cannes (clockwise from upper l.): Barry Day of Lintas:Worldwide and his wife, Lynne Carey, enjoy the view; Mary Moore of Wells, Rich, Greene and Tim Mellors of Publicis U.K. have jury duty; Patricia Viotti of Jodaf, Washington Olivetto of W/Brasil and Tito Munoz of Saatchi & Saatchi/RCP get festive.**

# Top prize to U.K. shop

## U.S. agencies bag 5 Gold Lions at festival

**By Laurel Wentz**

CANNES—A U.K. campaign for Maxell audiotapes won the Grand Prix at the International Advertising Film Festival here last week.

Three-year-old London agency Howell Henry Chaldecott Lury beat out a British Airways spot by Saatchi & Saatchi Advertising, London, and a Chanel spot from France for Egoiste perfume for men, created in-house.

The U.S.'s chance to win the top honor was diminished when Chiat/Day/Mojo's Energizer Bunny campaign for Eveready Battery Co. got thrown out by judges on the grounds it wasn't original *(see related story on Page 56)*.

**Bob Garfield reviews the Maxell audiotape spot, the Grand Prix winner at Cannes—Page 60.**

But U.S. shops did pick up five Gold Lions, including four from regional agencies, seven Silvers and 17 Bronzes.

Gold winners included BBDO Worldwide, New York, for its "Ray Charles" spot for Diet Pepsi, in which the blind musician tastes the difference when someone switches his Diet Pepsi with Diet Coke.

Other, unexpected winners included Minneapolis-based Fallon McElligott's "Handshake" spot for First Tennessee Bank, in which two men do a bizarre ritual greeting to show how hard it is to get a loan from other banks. Earle Palmer Brown Cos., Bethesda, Md., won a Gold for "Frank's Return" for Bob's Big Boy, in which a man returns home to his remarried wife after 15 years at a Big Boy.

In a bizarre spot from Steve

*(Continued on Page 56)*

## LAST MINUTE NEWS

### Heileman taps Della Femina

LA CROSSE, Wis.—G. Heileman Brewing Co. consolidated its approximately $20 million in ad business at Della Femina McNamee, New York. The agency also picked up $10 million in sales promotion spending, previously handled by a variety of shops. Previous agencies were Borders, Perrin & Norrander, Portland, Ore., and Seattle (Henry Weinhard); W.B. Doner & Co., Baltimore (Colt 45 malt liquor); Chiat/-Day/Mojo, San Francisco (Rainier and Lone Star); and Young & Rubicam, Chicago (Old Style and Special Export). Della Femina's Pittsburgh office previously had the Iron City brands of Pittsburgh Brewing Co., a Heileman sister company. The size of the Heileman account may hinge on how the brewer's debt is restructured. The restructuring—expected to be completed by week's end—is likely to put Heileman's banks in firm control, removing Australian brewing and media executive Alan Bond as a major factor.

### Texas threatens Ragu

AUSTIN, Texas—The Texas Department of Health is threatening to seize Ragu Fresh Italian pasta sauce in a labeling dispute. The department said in a letter to Chesebrough-Pond's Ragu Foods unit that the state will start placing the product "under state detention at the wholesale level within 60 days." The letter said the sauce violates

*(Continued on Page 8)*

## INSIDE

**Ad Age reports on top 100 media companies** (Starts after Page 34)

# IN THIS ISSUE


- **Nike** knows that Bo knows sports, and in a new spot, 15 Bos (and a Bono) prove it ..... 4
- **RJR** is testing two new cigarettes that are strikingly similar to the failed black-oriented Uptown brand ..... 6
- **The Detroit Pistons** are shedding their "bad boy" image and shooting for more endorsement contracts 16
- **AT&T advertising** fends off a complaint from US Sprint in the May NAD review ..... 48
- **Monet**, the U.S. costume jewelry leader, doubles its ad budget as competition for fickle consumers grows ..... 49
- **P&G's Tide** detergent rides back into the AdWatch survey of top 10 ads on a wave of stronger advertising and an Earth Day promotion ..... 50
- **A P&G** founder's descendant joins the fight to end Folgers' purchase of Salvadoran coffee beans ..... 55

**VIEWPOINT**

- Sid Bernstein: "Ethics" and a White House faux pas .. 20
- Forum: A new ratings proposal ..... 22
- James Brady: Barbour meets Jack, Doc & Reggie .. 32
- Joe Winski: The real life of Dick Tracy ..... 32

Editorials ..... 20 The Next Trend ..... 32
Letters ..... 24

**Focus on France**


- Giant Havas eyes more growth ..... 36
- BSN feasts on acquisitions ..... 37

**MEDIAWORKS**

- Magazine ad pages continue to decline ..... 38
- Consumer Linage ..... 39

**MARKETING TO HISPANICS**

- Media, agencies squabble over TV rate jumps ..... 40

**PEOPLE**

- People Moving ..... 41
- Brady's Bunch ..... 42
- Photo Review ..... 46

- Maxell uses cue cards and garbled lyrics from actual songs to make it perfectly clear that today's music is meant to be heard on their audiotapes.


U.S. NewsWatch ..... 12 For the Record ..... 58
Corrections & Clarifications . 24 Index to Advertisers ..... 60
Classified ..... 52


Contents copyright 1990 by Crain Communications Inc. All rights reserved.

ABP ABC

# Suchard buy brings PM close to Nestle

**By Judann Dagnoli and Dagmar Mussey**

Philip Morris Cos. appears to have hit upon a seamless acquisition in Jacobs Suchard, a fit that will make Philip Morris a major power in European coffee and chocolate and closer in line with marketing superpower Nestle.

With the acquisition of Zurich-based Suchard last week, Philip Morris vaults into third place in the European confectionery market and the leading position in European ground-roast coffee.

Under the deal, announced Friday, a holding company owned by Suchard Chairman-CEO Klaus Jacobs becomes a unit of Philip Morris, giving the latter an estimated 60% control of the operating company. Philip Morris later will make a tender offer for the remainder of publicly traded Suchard shares. When the deal is completed, the acquisition cost is expected to be $3.8 billion.

The deal gives Philip Morris a well-established stable of brands, including Milka and Toblerone chocolates, and Kroenung, Night & Day and Jacobs Cafe coffee.

Not included in the purchase are Suchard's Canadian subsidiary, E.J. Brach in the U.S. and Suchard's industrial chocolate business. Mr. Jacobs is buying these back.

The combination will give Philip Morris, which in 1989 had $5 billion in international cigarette revenues and $3 billion in international food revenues, a total of $11.6 billion in revenues outside the U.S. Philip Morris' total revenues for 1989 were $52 billion.

Suchard offers Philip Morris an "entree into the $26 billion European confectionery market" and a stronger foothold in the $8 billion European coffee market, said Diana Temple, Salomon Bros. analyst.

The acquisition also will put Philip Morris well ahead of Nestle in the European ground-coffee race.

In 1989, Suchard held an estimated 15% share of the total European roasted coffee market. Philip Morris-owned General Foods International held a 6.5% European share last year while Nestle held 3.3%.

Les Pugh, Salomon analyst in London, said the Suchard deal will "make PM a much more formidable competitor with Nestle," which he said now holds 22% of the European confectionery market, vs. Mars Inc.'s 18% and Suchard's 11%.

Suchard's ad agency lineup also seems to be a neat fit with Philip Morris' international agency roster.

Young & Rubicam, Frankfurt, is worldwide agency for Suchard's Milka and also Philip Morris' agency for its Kaffee Hag coffee. Saatchi & Saatchi Advertising handles Suchard coffee, and Philip Morris already is indirectly linked with that shop through New York-based Backer Spielvogel Bates Worldwide, which handles Miller Brewing Co. and Parliament cigarettes. Both shops are units of Saatchi & Saatchi Co., London.

Suchard has been seeking a

*(Continued on Page 60)*

# Texas warns Heartwise

**By Jennifer Lawrence and Julie Liesse**

Kellogg Co.'s Heartwise cereal may be yanked from store shelves in Texas unless the company can prove the product isn't a drug.

The Texas Department of Health, through the state attorney general's office, last week notified Kellogg that the department's food and drugs division believes Heartwise's psyllium content makes the cereal an "unapproved new drug."

Psyllium is an Indian grain used in some laxatives. It's a concentrated form of soluble fiber that Kellogg research shows can help reduce cholesterol.

On Friday, Celeste Clark, Kellogg VP-nutrition marketing and communications, told *Advertising Age*, "We are particularly perplexed at the inconsistency of the state's position on Heartwise, given their recently announced position that a food manufacturer would be permitted to represent his product as part of a diet low in cholesterol and saturated fat—one that can reduce the risk of heart disease.

"When you look at this inconsistency, it's a clear example of why national uniformity in labeling and health claims is necessary and critical."

Kellogg has staked a lot on Heartwise. Although the company has scaled down expectations for the product, its previous public statements indicate it's unlikely to back down in a confrontation with Texas.

"We continue to be committed to Heartwise and are optimistic about its potential in the marketplace," Ms. Clark said.

Kellogg Chairman-CEO William LaMothe is a vocal opponent of state intervention in health claims and labeling, and has stated repeatedly the company believes strongly in the science behind Heartwise's product proposition.

The company complied with a request for more information on Heartwise last fall from the U.S. Food & Drug Administration (AA, April 9). The FDA inquiry is still under way—a factor that prompted Texas officials to take immediate action, sources say.

Kellogg last week received a cover letter from Texas Assistant Attorney General Stephen Gardner dated June 20 that included a copy of a letter to him from Dennis Baker, the state health department's director of the division of food and drugs.

Mr. Baker's letter, dated June 15, said psyllium doesn't have "Generally Recognized as Safe" (GRAS) status with the Food & Drug Administration. For that reason, Heartwise violates Texas law and could be prohibited from sale there. □

# EPA may set green claims

**By Steven W. Colford**

WASHINGTON—Draft legislation from Sen. Frank Lautenberg (D., N.J.) would make the Environmental Protection Agency responsible for establishing definitions governing all environmental marketing claims.

The draft bill, a copy of which was obtained last week by *Advertising Age*, is being circulated among business, consumer and environmental groups for comments.

The proposal would set up a 13-member board of consumer, environmental and industry advocates to come up with product marketing rules or guides.

An aide to Sen. Lautenberg said a bill is expected to be introduced before the Aug. 6 Senate recess, but it's not clear how closely it will resemble the draft version.

Ever since Sen. Lautenberg said at a May 16 Senate hearing that he was drafting legislation to deal with marketers' burgeoning use of environmental claims, some observers have feared the bill might try to establish definitions for such terms as biodegradable or recyclable. But instead, the draft legislation calls for the new board to handle that task.

Under the proposal, that board would recommend to the EPA within six months of its first meeting a set of "definitions and standards to be used in regulating environmental marketing claims on a national basis."

The draft would appear to let states sue marketers believed to have violated the established definitions. It stipulates a civil penalty of up to $25,000 for each violation and a criminal penalty of $25,000 per day of violation and jail of up to a year, or both.

Initial reactions to the draft hasn't been positive.

The Sierra Club, for example, says the federal government should stick to research and leave details like definitions and standards to private organizations.

A section of the draft that's particularly upsetting business interests would require marketers using environmental claims relating to the "recyclable" nature of a product or its packaging to provide information "that specifies each state in which such product or packaging is recycled at a sufficient level . . . to warrant the use of such term." □

# 100 LEADING MEDIA COMPANIES

## Top 100's media revenues up 8% to $71 billion, but cutoff dips for first time

By R. Craig Endicott

Time Warner executives can utter the classic second-place lament: Wait until next year.

Although Capital Cities/ABC again can claim the title as the nation's top media company with $4.8 billion in 1989 revenues, Time Warner is poised to offer the greatest challenge for the lead in recent years. Time Warner's $4.6 billion revenue figure fell just $192 million shy of Cap Cities' total, according to *Advertising Age's* 10th annual report on the 100 Leading Media Companies.

Time Warner appears to represent that which is best in generating media revenues: magazines and cable systems.

The nation's top 100 media companies built up strong 1989 returns largely from cable and magazine properties. They collected media revenues of $71.2 billion, up 8% from 1988.

Time Warner, a merger of Time Inc., No. 2 in last year's report, and Warner Communications, previously No. 30, is the apotheosis of the two hot media categories, drawing 59.9% of its media net revenues from cable (Warner Cable Communications, American Television & Communications Corp. and Home Box Office) and the remainder from a powerful roster of consumer magazines.

Although the $14 billion merger of Time and Warner still left the combo in Time's old runner-up spot, there was plenty of maneuvering within the Top 10.

- Gannett Co. replaced General Electric Co. in the No. 3 slot as the latter's NBC-TV Network and its owned-and-operated stations suffered a 6.8% decline in net revenue.
- CBS Inc. retained No. 5, while Advance Publications moved to No. 6 from No. 7, switching with Times Mirror Co.
- Acquisition-minded TCI exploded from No. 11 a year ago to No. 8.
- Last year's No. 8, Knight-Ridder, clung to the No. 9 position, barely holding off fast-charging News Corp.

Magazine revenues generated by the 37 media companies on the list grew a strong 12.8% to $11.9 billion, increasing the category's share of the 100's total media pie from 15.9% in 1988 to 16.7% in 1989.

That growth rate likely will not hold. Publishers Information Bureau reports consumer magazine advertising is up only 1.9% from January through May this year.

Cable continued to climb, although not as rapidly in terms of percentage growth as in previous years.

Thirty-four companies with cable operations among the Top 100 pushed the category's net revenues to $13.4 billion, up 17.9% from the prior year but off the 23.9% pace charted by the same cable properties in 1988. Cable boosted its share of the Top 100's total media revenues to 18.7%, up from 17.2% in 1988.

Both magazines and cable stole share points from the other major media categories even though the others recorded marginal to modest growth.

TV slipped from 22.9% to 21.6% of total media and radio dipped from 1.6% to 1.5%.

While still the biggest revenue generator, newspapers fell the furthest in terms of contributing to total revenues, falling from 37.4% to 36%.

Indicative of magazines' relative health as a media property, revenues of two of the four new entries to this year's Top 100 were fueled by magazines. Additions include No. 73 Family Media and No. 95 Pittway Corp.

Ackerley Communications entered the chart at No. 99 with its outdoor media, and Heritage Communications reached No. 84 through its purchase of Actmedia Inc., an in-store company that accounts for 70.4% of Heritage's net revenues.

To qualify for the Top 100 list, a media company required net revenues of $130.1 million, represented by No. 100 DTH Media, parent of the *Dallas Times-Herald*. It edged Knapp Communications, which earned $130 million in revenue.

For the first time in the 10 years *Advertising Age* has been tracking media companies, the revenue cutoff declined. This illustrates the impact of consolidations over the past few years among leading media companies and the relatively slow growth in several media categories in 1989.

Magazine sector growth engineered some dramatic leaps on the chart. Moving at least eight places were Reed Publishing USA (formerly Cahners Publishing Co.), from No. 37 to No. 27; International Data Group from No. 52 to No. 41; Ziff Communications from No. 71 to No. 63; Forbes Inc. from No. 76 to No. 68; Maclean Hunter from No. 77 to No. 69; Edgell Communications from No. 91 to No. 72; U.S. News & World Report from No. 93 to No. 82; and CMP Publications from No. 98 to No. 89

However, it wasn't all rosy in the magazine category. Reader's Digest Association dipped to No. 26 from No. 23 a year earlier based on a 1.8% decline in net revenues largely associated with the flat performance of *Reader's Digest*.

Consolidation among cable properties continued to influence net revenue growth. TCI joined with No. 66 Adelphia Communications Corp. in buying out Cooke Media's cable operations for $1.6 billion. Continental Cablevision, No. 20, spent $500 million for five major cable systems.

Such consolidations helped push revenue growth above 20% for a number of cable companies, with TCI up 38%.

TV operations, unlike cable, fared poorly. The 43 companies with TV properties saw net revenues crawl forward to $15.4 billion, a 1.8% advance compared with a 6.3% movement in the prior year.

Newspapers turned in a decidedly lackluster performance. Net revenues of 49 companies with newspaper operations grew 3.9% to $25.6 billion, reflecting the same growth rate as in 1988.

Both media categories are not likely to rebound in 1990 as TV and newspaper advertising continues to soften. Although the major newspaper companies' growth was marginal, the public companies among them performed fairly well. *(See chart on Page S-3.)*

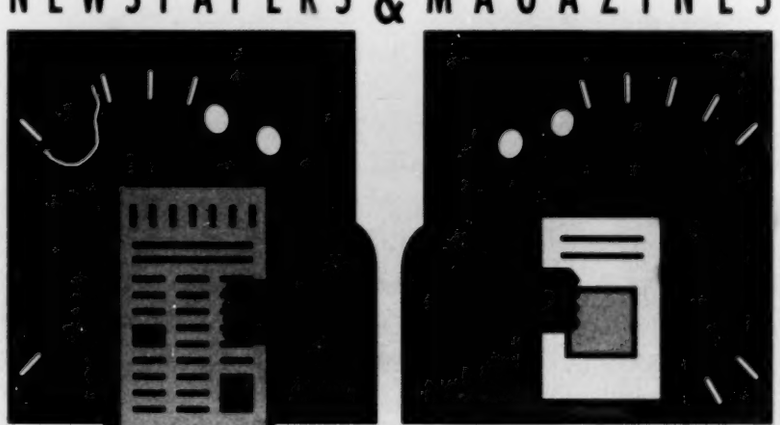
The public companies' percentage of media to total revenues slipped from 32.9% in 1988 to 32.4% in 1989. Media revenues of the 49 public companies grew to $50.3 billion, up 7.9%, while total revenues expanded 9.9% to $155.2 billion. □

*Copyright ©1990 by Crain Communications Inc. Quotations or reproductions in whole or in part without written permission are expressly prohibited.*

### INSIDE THIS REPORT

Sagging broadcast segment looks to rebound from its sharply reduced ad revenue increases; leader remains General Electric ..... S-7

Cable revenues of leaders gain 17.9%, a somewhat slower growth rate; meantime, pay cable is struggling for subscribers ..... S-8




Illustrations by Steve Musgrave

Print media are heading in separate directions as far as the Top 100 are concerned. Newspapers are feeling the advertising pinch, while magazines are posting hefty percentage gains; Gannett leads the category with nearly $3 billion in newspaper revenues, and Time Warner dwarfs the magazine competition ..... S-6

Top 15 publicly held companies ranked by return on sales ..... S-6

Paced by GTE, Yellow Pages leaders gain 8% to $7.7 billion ..... S-8

# 100 leading media companies by revenue

| Rank 1989 | Rank 1988 | Company, headquarters | Total media revenue 1989 | Total media revenue 1988 | % chg | Newspaper revenue 1989 | Newspaper revenue 1988 | Magazine revenue 1989 | Magazine revenue 1988 | Broadcast* revenue 1989 | Broadcast* revenue 1988 | Cable TV revenue 1989 | Cable TV revenue 1988 | Other media revenue 1989 | Other media revenue 1988 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 1 | **Capital Cities/ABC**, New York | $4,767.0 | $4,588.5 | 3.9 | $490.9 | $468.9 | $376.1 | $370.0 | $3,584.9 | $3,506.5 | $315.1 | $241.1 | — | — |
| 2 | 2 | **Time Warner**, New York | 4,575.0 | 4,142.0 | 10.5 | — | — | 1,855.0 | 1,752.0 | — | — | 2,720.0 | 2,390.0 | — | — |
| 3 | 4 | **Gannett Co.**, Arlington, Va. | 3,518.2 | 3,314.5 | 6.1 | 2,852.0 | 2,697.9 | — | — | 408.3 | 360.5 | — | — | $257.9 | $226.1 |
| 4 | 3 | **General Electric Co.**, Fairfield, Conn. | 3,392.0 | 3,638.0 | (6.8) | — | — | — | — | 3,392.0 | 3,638.0 | — | — | — | — |
| 5 | 5 | **CBS Inc.**, New York | 2,959.9 | 2,776.8 | 6.6 | — | — | — | — | 2,959.9 | 2,776.8 | — | — | — | — |
| 6 | 7 | **Advance Publications**, Newark, N.J. | 2,881.7 | 2,655.5 | 8.5 | 1,745.0 | 1,681.1 | 841.9 | 745.0 | — | — | 294.8 | 229.4 | — | — |
| 7 | 6 | **Times Mirror Co.**, Los Angeles | 2,807.1 | 2,677.0 | 4.8 | 2,065.9 | 1,997.7 | 305.9 | 298.5 | 102.8 | 99.0 | 332.5 | 282.7 | — | — |
| 8 | 11 | **TCI**, Denver | 2,353.0 | 1,705.1 | 38.0 | — | — | — | — | — | — | 2,353.0 | 1,705.1 | — | — |
| 9 | 8 | **Knight-Ridder**, Miami | 2,261.8 | 2,077.1 | 8.9 | 1,988.4 | 1,917.4 | — | — | — | — | — | — | 273.4 | 159.7 |
| 10 | 13 | **News Corp.**, Sydney | 2,203.0 | 1,683.3 | 30.9 | 284.0 | 195.7 | 713.0 | 509.6 | 700.0 | 620.0 | — | — | 506.0 | 358.0 |
| 11 | 10 | **Tribune Co.**, Chicago | 2,098.6 | 1,985.5 | 5.7 | 1,630.7 | 1,561.7 | — | — | 468.1 | 423.8 | — | — | — | — |
| 12 | 9 | **Hearst Corp.**, New York | 2,094.5 | 1,986.0 | 5.5 | 700.0 | 689.0 | 992.5 | 919.0 | 270.5 | 263.0 | 20.5 | 15.0 | 111.0 | 100.0 |
| 13 | 12 | **New York Times Co.**, New York | 1,766.9 | 1,700.1 | 4.0 | 1,398.5 | 1,360.1 | 295.6 | 240.1 | 65.0 | 62.5 | — | — | 8.0 | 8.4 |
| 14 | 14 | **Cox Enterprises**, Atlanta | 1,664.0 | 1,578.2 | 5.4 | 754.0 | 739.0 | — | — | 400.5 | 367.4 | 509.5 | 471.8 | — | — |
| 15 | 15 | **Washington Post Co.**, Washington | 1,372.9 | 1,305.6 | 5.2 | 728.7 | 682.7 | 334.4 | 327.5 | 182.5 | 180.2 | 129.3 | 115.2 | — | — |
| 16 | 17 | **Thomson Corp.**, Toronto | 1,327.6 | 1,126.0 | 17.9 | 594.5 | 530.0 | 733.1 | 596.0 | — | — | — | — | — | — |
| 17 | 18 | **Viacom International**, New York | 1,198.7 | 1,113.8 | 7.6 | — | — | — | — | 146.1 | 141.2 | 1,052.6 | 972.6 | — | — |
| 18 | 16 | **E.W. Scripps**, Cincinnati | 1,180.0 | 1,133.8 | 4.1 | 780.1 | 770.2 | — | — | 222.6 | 214.1 | 177.3 | 149.5 | — | — |
| 19 | 19 | **Dow Jones & Co.**, New York | 975.2 | 973.1 | 0.2 | 941.2 | 937.1 | 34.0 | 36.0 | — | — | — | — | — | — |
| 20 | 22 | **Continental Cablevision**, Boston | 780.0 | 622.0 | 25.4 | — | — | — | — | — | — | 780.0 | 622.0 | — | — |
| 21 | 26 | **Turner Broadcasting System**, Atlanta | 726.7 | 537.6 | 35.5 | — | — | — | — | — | — | 726.7 | 537.6 | — | — |
| 22 | 20 | **Ingersoll Publications Co.**, Princeton, N.J. | 669.5 | 645.0 | 3.8 | 669.5 | 645.0 | — | — | — | — | — | — | — | — |
| 23 | 21 | **Westinghouse Electric Corp.**, Pittsburgh | 646.0 | 632.8 | 2.1 | — | — | — | — | 646.0 | 632.8 | — | — | — | — |
| 24 | 24 | **Advo-Systems**, Windsor, Conn. | 617.7 | 589.0 | 4.9 | — | — | — | — | — | — | — | — | 617.7 | 589.0 |
| 25 | 25 | **Belo Corp.**, Dallas | 594.2 | 572.4 | 3.8 | 594.2 | 572.4 | — | — | — | — | — | — | — | — |
| 26 | 23 | **Reader's Digest**, Pleasantville, N.Y. | 589.4 | 600.4 | (1.8) | — | — | 589.4 | 600.4 | — | — | — | — | — | — |
| 27 | 37 | **Reed Publishing USA**, Newton, Mass. | 580.0 | 420.0 | 38.1 | — | — | 580.0 | 420.0 | — | — | — | — | — | — |
| 28 | 28 | **McGraw-Hill**, New York | 557.3 | 509.8 | 9.3 | — | — | 460.0 | 413.7 | 97.3 | 96.1 | — | — | — | — |
| 29 | 32 | **Meredith Corp.**, Des Moines, Iowa | 531.4 | 474.7 | 11.9 | — | — | 417.1 | 365.1 | 114.3 | 109.6 | — | — | — | — |
| 30 | 40 | **Valassis Inserts**, Livonia, Mich. | 525.0 | 400.0 | 31.3 | — | — | — | — | — | — | — | — | 525.0 | 400.0 |
| 31 | 33 | **SCI Holdings**, Miami | 516.0 | 472.1 | 9.3 | — | — | — | — | — | — | 516.0 | 472.1 | — | — |
| 32 | 29 | **Affiliated Publications**, Boston | 515.1 | 506.5 | 1.7 | 435.6 | 444.5 | 79.5 | 62.0 | — | — | — | — | — | — |
| 33 | 30 | **Comcast Corp.**, Bala-Cynwyd, Pa. | 502.0 | 404.1 | 24.2 | — | — | — | — | — | — | 502.0 | 404.1 | — | — |
| 34 | 27 | **United Artists Entertainment Co.**, Denver | 501.3 | 513.6 | (2.4) | — | — | — | — | — | — | 501.3 | 513.6 | — | — |
| 35 | 31 | **Cablevision Systems Corp.**, Woodbury, N.Y. | 492.7 | 493.5 | (0.2) | — | — | — | — | — | — | 492.7 | 493.5 | — | — |
| 36 | 35 | **Media General**, Richmond, Va. | 451.1 | 445.0 | 1.4 | 298.1 | 298.9 | 13.5 | 13.5 | 56.2 | 61.8 | 83.3 | 70.8 | — | — |
| 37 | 38 | **Freedom Newspapers**, Irvine, Calif. | 449.7 | 432.0 | 4.1 | 367.0 | 353.0 | — | — | 82.7 | 79.0 | — | — | — | — |
| 38 | 34 | **Harte-Hanks Communications**, San Antonio, Texas | 436.3 | 462.7 | (5.7) | 319.0 | 342.4 | — | — | 24.3 | 26.0 | — | — | 93.0 | 94.3 |
| 39 | 36 | **Central Newspapers**, Indianapolis | 436.2 | 417.0 | 4.5 | 436.2 | 417.0 | — | — | — | — | — | — | — | — |
| 40 | 43 | **Chronicle Publishing Co.**, San Francisco | 421.0 | 384.0 | 9.6 | 247.0 | 234.0 | — | — | 99.0 | 96.0 | 75.0 | 54.0 | — | — |
| 41 | 52 | **International Data Group**, Framingham, Mass. | 420.0 | 312.0 | 19.3 | — | — | 420.0 | 352.0 | — | — | — | — | — | — |
| 42 | 42 | **A.H. Belo Corp.**, Dallas | 417.1 | 385.4 | 8.2 | 238.0 | 220.1 | — | — | 179.2 | 165.3 | — | — | — | — |
| 43 | 49 | **Landmark Communications**, Norfolk, Va. | 414.0 | 363.6 | 13.9 | 341.2 | 293.6 | — | — | 29.8 | 27.9 | 43.2 | 32.2 | — | — |
| 44 | 41 | **Pulitzer Publishing Co.**, St. Louis | 402.2 | 391.0 | 2.9 | 296.8 | 287.2 | — | — | 105.4 | 103.8 | — | — | — | — |
| 45 | 47 | **Oklahoma Publishing Co.**, Oklahoma City | 398.8 | 374.0 | 6.6 | 127.0 | 125.0 | — | — | 159.6 | 156.0 | 113.0 | 93.0 | — | — |
| 46 | 44 | **Morris Communications**, Augusta, Ga. | 395.3 | 382.6 | 3.3 | 265.5 | 258.3 | — | — | — | — | — | — | 129.8 | 124.3 |
| 47 | 48 | **Hachette Filipacchi**, Paris | 395.0 | 368.0 | 7.9 | — | — | 395.0 | 368.0 | — | — | — | — | — | — |
| 48 | 45 | **Copley Newspapers**, La Jolla, Calif. | 392.9 | 381.3 | 3.0 | 384.5 | 373.9 | — | — | — | — | 8.4 | 7.4 | — | — |
| 49 | 46 | **Advance Inc.**, Greenville, S.C. | 384.7 | 374.0 | 2.9 | 137.9 | 135.2 | — | — | 136.9 | 136.9 | 109.9 | 101.9 | — | — |
| 50 | 53 | **Reuters Holdings PLC**, London | 378.2 | 351.3 | 7.7 | — | — | — | — | — | — | — | — | 378.2 | 351.3 |
| 51 | 50 | **Gates Rubber**, Denver | 367.0 | 354.0 | 3.7 | — | — | — | — | 367.0 | 354.0 | — | — | — | — |
| 52 | 51 | **McClatchy Newspapers**, Sacramento, Calif. | 365.6 | 352.6 | 3.7 | 365.6 | 352.6 | — | — | — | — | — | — | — | — |
| 53 | 54 | **Cowles Media Co.**, Minneapolis | 329.8 | 315.0 | 4.7 | 280.3 | 273.0 | 49.5 | 42.0 | — | — | — | — | — | — |
| 54 | 55 | **Donrey Media Group**, Fort Smith, Ark. | 312.2 | 300.0 | 4.1 | 236.8 | 228.1 | — | — | 9.7 | 9.6 | 11.4 | 10.3 | 54.3 | 52.0 |
| 55 | 57 | **Journal Communications**, Milwaukee | 285.7 | 274.9 | 3.9 | 232.6 | 222.7 | — | — | 53.7 | 52.7 | — | — | — | — |
| 56 | 58 | **Associated Press**, New York | 275.7 | 261.3 | 5.5 | — | — | — | — | — | — | — | — | 275.7 | 261.3 |
| 57 | 59 | **3M**, St. Paul | 264.8 | 249.8 | 6.0 | — | — | — | — | — | — | — | — | 264.8 | 249.8 |
| 58 | 61 | **Providence Journal Co.**, Providence, R.I. | 260.0 | 243.0 | 7.0 | 133.0 | 133.0 | — | — | 42.0 | 32.0 | 85.0 | 78.0 | — | — |
| 59 | 60 | **National Geographic Society**, Washington | 255.5 | 245.4 | 4.1 | — | — | 255.5 | 245.4 | — | — | — | — | — | — |
| 60 | 63 | **Lee Enterprises**, Davenport, Iowa | 250.0 | 234.8 | 6.5 | 180.2 | 166.9 | — | — | 69.8 | 67.9 | — | — | — | — |
| 61 | 62 | **Chicago Sun-Times Co.**, Chicago | 249.5 | 235.4 | 6.0 | 249.5 | 235.4 | — | — | — | — | — | — | — | — |
| 62 | 64 | **Claris-Craft Industries**, New York | 246.7 | 230.6 | 7.0 | — | — | — | — | 246.7 | 230.6 | — | — | — | — |
| 63 | 71 | **Ziff Communications**, New York | 240.0 | 200.0 | 20.0 | — | — | 240.0 | 200.0 | — | — | — | — | — | — |
| 64 | 66 | **Sammons Communications**, Dallas | 239.0 | 215.8 | 10.8 | — | — | — | — | — | — | 239.0 | 215.8 | — | — |
| 65 | 65 | **Blade Communications**, Toledo, Ohio | 232.6 | 225.2 | 3.3 | 180.6 | 174.0 | — | — | 17.0 | 16.2 | 35.0 | 35.0 | — | — |
| 66 | 75 | **Adelphia Communications Corp.**, Coudersport, Pa. | 231.5 | 185.0 | 25.1 | — | — | — | — | — | — | 231.5 | 185.0 | — | — |
| 67 | 74 | **Petersen Publishing Co.**, Los Angeles | 214.8 | 186.7 | 15.0 | — | — | 214.8 | 186.7 | — | — | — | — | — | — |
| 68 | 76 | **Forbes Inc.**, New York | 213.1 | 181.4 | 17.5 | 6.6 | 6.4 | 206.5 | 175.0 | — | — | — | — | — | — |
| 69 | 77 | **Maclean Hunter**, Toronto | 210.7 | 180.3 | 16.9 | — | — | 79.4 | 73.1 | — | — | 131.3 | 114.1 | — | — |
| 70 | 72 | **Times Publishing Co.**, St. Petersburg, Fla. | 209.0 | 194.0 | 7.7 | 181.0 | 169.1 | 28.0 | 24.9 | — | — | — | — | — | — |
| 71 | 68 | **Scripps League Newspapers Inc.**, Cincinnati, Ohio | 208.1 | 204.1 | 2.0 | 140.0 | 140.0 | 2.1 | 2.1 | 63.3 | 62.3 | — | — | — | — |
| 72 | 91 | **Edgell Communications**, Cleveland | 205.0 | 148.3 | 38.2 | — | — | 205.0 | 148.3 | — | — | — | — | — | — |
| 73 | NA | **Family Media**, New York | 204.2 | 185.0 | 10.4 | — | — | 204.2 | 185.0 | — | — | — | — | — | — |
| 74 | 78 | **TeleCable Corp.**, Norfolk, Va. | 204.0 | 180.0 | 13.3 | — | — | — | — | — | — | 204.0 | 180.0 | — | — |
| 75 | 70 | **Seattle Times Co.**, Seattle | 200.0 | 200.0 | 0.0 | 200.0 | 200.0 | — | — | — | — | — | — | — | — |
| 76 | 67 | **Macfadden Holdings**, New York | 198.0 | 209.0 | (5.3) | 153.0 | 164.0 | 45.0 | 45.0 | — | — | — | — | — | — |
| 77 | 69 | **Cox Newspapers Inc.**, Cincinnati | 197.7 | 200.4 | (1.3) | — | — | — | — | 197.7 | 200.4 | — | — | — | — |
| 78 | 83 | **Century Communications Corp.**, New Canaan, Conn. | 186.4 | 160.0 | 16.5 | — | — | — | — | — | — | 186.4 | 160.0 | — | — |
| 79 | 81 | **Hearst Business Publications**, Albany, N.Y. | 182.6 | 170.2 | 7.3 | — | — | — | — | — | — | 182.6 | 170.2 | — | — |
| 80 | 79 | **Patrick Media Group**, Scranton, Pa. | 182.0 | 175.0 | 4.0 | — | — | — | — | — | — | — | — | 182.0 | 175.0 |
| 81 | 80 | **Knight-Ridder Financial**, New York | 180.2 | 173.4 | 3.9 | 152.7 | 147.1 | — | — | 27.5 | 26.3 | — | — | — | — |
| 82 | 93 | **U.S. News & World Report**, Washington | 170.2 | 141.8 | 20.0 | — | — | 170.2 | 141.8 | — | — | — | — | — | — |
| 83 | 85 | **Times Journal Co.**, Springfield, Va. | 169.5 | 157.1 | 7.9 | 169.5 | 157.1 | — | — | — | — | — | — | — | — |
| 84 | NA | **Heritage Media Corp.**, Dallas | 165.0 | 46.5 | 254.8 | — | — | — | — | 48.9 | 46.5 | — | — | 116.1 | — |
| 85 | 87 | **Whitney Communications**, Rockville, Md. | 160.0 | 150.0 | 6.7 | — | — | 69.0 | 69.0 | — | — | 73.0 | — | 18.0 | 81.0 |
| 86 | 84 | **LIN Broadcasting**, New York | 162.4 | 158.4 | 2.5 | — | — | 23.4 | 21.2 | 139.0 | 137.2 | — | — | — | — |
| 87 | 89 | **Meredith/New Heritage**, New York | 160.0 | 152.0 | 5.3 | — | — | 160.0 | 152.0 | — | — | — | — | — | — |
| 88 | 73 | **Howard Publications**, Oceanside, Calif. | 160.0 | 190.0 | (15.8) | 160.0 | 155.0 | — | — | — | 20.0 | — | 15.0 | — | — |
| 89 | 88 | **Hubbard Broadcasting**, St. Paul | 157.4 | 153.0 | 2.9 | 23.4 | 19.8 | 24.1 | 20.6 | — | — | — | — | — | — |
| 90 | 96 | **Univision Holdings**, New York | 153.1 | 136.3 | 12.3 | — | — | — | — | 153.1 | 136.3 | — | — | — | — |
| 91 | 90 | **Park Communications**, Ithaca, N.Y. | 152.1 | 148.2 | 2.6 | 83.8 | 87.2 | — | — | 68.3 | 61.0 | — | — | — | — |
| 92 | 82 | **Houston Industries**, Houston, Texas | 150.4 | 162.9 | (7.7) | — | — | — | — | — | — | 150.4 | 162.9 | — | — |
| 93 | 92 | **Providence Journal**, Charleston, S.C. | 149.0 | 145.0 | 2.8 | — | — | 139.1 | 139.1 | — | — | 9.9 | 5.9 | — | — |
| 94 | 95 | **Crain Communications**, Chicago | 145.1 | 137.2 | 5.8 | — | — | 144.7 | 136.8 | 0.4 | 0.4 | — | — | — | — |
| 95 | 86 | **Cox Cable Communications**, Atlanta | 144.8 | 156.8 | (7.7) | — | — | 144.8 | 156.8 | — | — | — | — | — | — |
| 96 | 94 | **H&C Communications**, Houston | 140.0 | 140.0 | 0.0 | — | — | — | — | 140.0 | 140.0 | — | — | — | — |
| 97 | 97 | **Deseret News Publishing**, Salt Lake City | 139.4 | 131.4 | 6.1 | — | — | — | — | 39.2 | 131.4 | — | — | — | — |
| 98 | 100 | **Berkshire Hathaway**, Omaha | 135.6 | 131.7 | 3.0 | 135.6 | 131.7 | — | — | — | — | — | — | — | — |
| 99 | NA | **Cox Enterprises**, Atlanta | 133.3 | 133.3 | 0.0 | — | — | — | — | 81.1 | 81.1 | — | — | 52.2 | 52.2 |
| 100 | 99 | **DTH Media**, Dallas | 130.0 | 132.5 | (1.9) | 130.0 | 132.5 | — | — | — | — | — | — | — | — |

Notes: Dollars are in millions. All figures are net revenues and AA estimates. See Page 5-3 for methodology. *Broadcast revenues include TV and radio.

Compiled by: Sarah Polster. AA chart: Kevin Brown

# Top 15 publicly held media companies by return on sales

| Rank 1989 | Rank 1988 | Company, headquarters | Percent return on sales 1989 | 1988 | change | Total revenues 1989 | 1988 | % chg | Net income 1989 | 1988 | % chg | Total media revenues 1989 | 1988 | % chg |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 31 | Chris-Craft Industries*, New York | 176.9 | 4.3 | 172.62 | $267.5 | $250.8 | 6.7 | $473.3 | $10.8 | 4,280.7 | $246.7 | $230.6 | 7.0 |
| 2 | 2 | LIN Broadcasting, New York | 22.9 | 36.4 | (13.51) | 250.7 | 225.5 | 11.2 | 57.4 | 82.1 | (30.1) | 162.4 | 158.4 | 2.5 |
| 3 | 6 | Dow Jones & Co., New York | 18.8 | 14.2 | 4.55 | 1,687.9 | 1,603.1 | 5.3 | 317.0 | 228.2 | 38.9 | 975.2 | 973.1 | 0.2 |
| 4 | 4 | Berkshire Hathaway, Omaha | 18.0 | 16.2 | 1.82 | 2,484.0 | 2,465.0 | 0.8 | 447.5 | 399.3 | 12.1 | 135.6 | 131.7 | 3.0 |
| 5 | 17 | Thomson Corp., Toronto | 17.5 | 9.2 | 8.28 | 5,112.0 | 4,726.0 | 8.2 | 895.0 | 436.0 | 105.3 | 1,327.6 | 1,126.0 | 17.9 |
| 6 | 5 | Lee Enterprises, Davenport, Iowa | 16.0 | 16.2 | (0.24) | 269.5 | 252.5 | 6.7 | 43.0 | 40.9 | 5.1 | 250.0 | 234.8 | 6.5 |
| 7 | 7 | Reuters Holdings PLC, London | 15.3 | 13.4 | 1.88 | 1,910.9 | 1,777.0 | 7.5 | 291.7 | 237.8 | 22.7 | 378.2 | 351.3 | 7.7 |
| 8 | 15 | New York Times Co., New York | 15.1 | 9.9 | 5.21 | 1,768.9 | 1,700.0 | 4.1 | 266.6 | 167.7 | 59.0 | 1,768.9 | 1,700.1 | 4.0 |
| 9 | 3 | Washington Post Co., Washington | 13.7 | 19.7 | (5.97) | 1,444.1 | 1,367.6 | 5.6 | 198.0 | 269.1 | (26.4) | 1,372.9 | 1,305.8 | 5.2 |
| 10 | 8 | Park Communications, Ithaca, N.Y. | 12.3 | 12.8 | (0.51) | 152.5 | 149.6 | 1.9 | 18.7 | 19.1 | (2.1) | 152.5 | 149.6 | 1.9 |
| 11 | 9 | Journal Communications, Milwaukee | 11.7 | 11.2 | 0.48 | 471.1 | 443.2 | 6.3 | 55.0 | 49.6 | 10.9 | 285.7 | 274.9 | 3.9 |
| 12 | 10 | Gannett Co., Arlington, Va. | 11.3 | 11.0 | 0.30 | 3,518.2 | 3,314.5 | 6.1 | 397.5 | 364.5 | 9.1 | 3,518.2 | 3,314.5 | 6.1 |
| 13 | 12 | Hearst Industries, Houston | 10.9 | 10.8 | 0.08 | 3,769.3 | 3,649.5 | 3.6 | 413.5 | 395.3 | 4.6 | 150.4 | 162.9 | (7.7) |
| 14 | 21 | Knight-Ridder, Miami | 10.9 | 7.5 | 3.39 | 2,268.3 | 2,083.3 | 8.9 | 247.2 | 156.4 | 58.1 | 2,261.8 | 2,077.1 | 8.9 |
| 15 | 11 | 3M, St. Paul | 10.4 | 10.3 | (0.53) | 11,990.0 | 10,581.0 | 13.3 | 1,244.0 | 1,154.0 | 7.8 | 264.6 | 249.6 | 6.0 |

**Notes:** Dollars are in millions. 1988 rankings are based on the position of 49 publicly-held media companies in this report. * Chris-Craft reported $1.3 billion in income associated with large holdings in Warner Communications. **Sources:** Corporate annual reports. **AA chart:** Kevin Brown

## Methodology

Companies listed on the 100 Leading Media Companies chart, whether U.S.- or foreign-based, were ranked by net revenues generated by their U.S. media properties. Net revenues exclude agency commission on the ad side and such items as provisions for newsstand returns, unpaid subscriptions and subscription agency commissions on the circulation side.

Figures used were either calendar year 1989 or the latest available fiscal returns.

Treatment of acquisitions and divestitures was on a pro forma basis where available. A pro forma reading was obtained for Time Warner reflecting combined net revenues had the merger been consummated at the beginning of 1988. Macfadden Holdings would not include *Star* magazine, purchased this year from News Corp.

Ratings shown for 1988 in this year's report are based on figures reported by companies or estimated by *Ad Age* this year.

The careful reader will note that a newcomer to this year's list, Family Media, publisher of such titles as *Discover*, *Health* and *Savvy*, should not have been a newcomer. Its 1988 total revenues ultimately were estimated at $165 million, surpassing that year's cutoff of $131.7 million.

With more than half the companies in this report private, estimates were required. Estimates by *Ad Age* or from secondary sources such as "Duncan's Radio Market Guide" for radio or Paul Kagan Associates for cable were shown to the media company whenever possible. Most private companies were forthcoming with their total net revenues and media category breakouts.

*Ad Age* identifies all the numbers as estimates even though most were confirmed by the companies because many of the numbers credited to certain media categories, such as TV and radio, rarely appear in such form in audited results. Most companies, for example, couple TV and radio under "broadcast" without specifying amounts in either.

Similarly, many media companies are involved in what *Ad Age* considers non-media activities, such as contract printing, book publishing, book and record clubs, movie production, etc. □

*R. Craig Endicott, Kevin Brown and Sarah Polster compiled information for this report.*


We treat Madison Avenue like it's Main Street.

Our national advertiser rates are a lot closer to our local rates than you expect. And we help you reach the entire metro market with one of the lowest CPMs, because you can reach up to 85 percent of metro Harrisburg's mainstream adults in a single issue. Want to know more? Call Bob Cobaugh, our national advertising manager, at (717) 255-8203. He'll treat you like you were a Harrisburger yourself.

The Patriot-News

Harrisburg, Pa. It's a buyer's market.

A Newhouse Newspaper

# Magazines run hotter than papers

Newspaper properties of the 100 Leading Media Companies, unlike their magazine counterparts, were locked in an industrywide ad crunch in 1989.

Newspaper volume leader Gannett Co. drew $2.9 billion from its newspaper operations for a 5.7% increase. The only other top 10 newspaper company to surpass this was Washington Post Co. with 6.4% growth. No other top 10 company grew more than 4.4% in revenue.

Those returns parallel the nationwide slippage in newspaper ad volume growth trends.

Newspaper ad growth in 1988 hit 6.1%, followed by last year's slower 3.8% uptick to $32.4 billion. The first quarter of this year continued the shrinkage as total advertising topped out at $7.3 billion, down 0.3% from the comparable quarter in 1989.

Classified advertising, particularly vulnerable to economic declines, dropped 11.2% for the quarter.

Competitive forces in the marketplace altered the newspaper landscape in 1989.

Hearst Corp.'s *Los Angeles Herald Examiner* closed down at yearend. Capital Cities/ABC's evening *Kansas City Star* early this year merged with the morning *Times*.

Ingersoll Publications' St. Louis *Sun* folded, and the Supreme Court approved the biggest joint operating agreement, in Detroit.

Magazine companies reported handsome gains that made Time Warner's advance of 5.9% seem paltry. On a volume basis, however, Time Warner's net revenue of almost $1.9 billion, nearly doubled Hearst's $992.5 million.

News Corp. registered the largest year-to-year percentage gain of 39.9% as it folded in full-year's results of its 1988 acquisition of Triangle Publications.

Some of the leading magazines changed hands during 1989 and early 1990 as *McCall's* went from Lang Communications to the New York Times Co.; *Sunset* was bought by Time Warner; the *Star* moved from News Corp. to Macfadden Holdings; and the travel publications of News Corp. left for Reed International.

In the first five months of 1990, ad volume of about $3 billion represented a slight increase of 1.2% over the comparable period in 1989. The increase, however, resulted from boosting rates; ad pages dipped 4.3% below earlier levels, according to Publishers Information Bureau. □

# Media companies by print revenue

## Newspaper companies

| Rank 1989 | Rank 1988 | Company | Newspaper revenue 1989 | Newspaper revenue 1988 | % chg | Newspaper as % of total media 1989 | Newspaper as % of total media 1988 | Total media 1989 |
|---|---|---|---|---|---|---|---|---|
| 1 | 1 | Gannett Co. | $2,852.0 | $2,697.9 | 5.7 | 81.1 | 76.7 | $3,518.2 |
| 2 | 2 | Times Mirror Co. | 2,065.9 | 1,997.7 | 3.4 | 73.6 | 71.2 | 2,807.1 |
| 3 | 3 | Knight-Ridder | 1,968.4 | 1,917.4 | 3.7 | 87.9 | 84.8 | 2,238.8 |
| 4 | 4 | Advance Publications | 1,745.0 | 1,681.1 | 3.8 | 60.6 | 58.3 | 2,881.7 |
| 5 | 5 | Tribune Co. | 1,630.7 | 1,561.7 | 4.4 | 77.7 | 74.4 | 2,099.8 |
| 6 | 6 | New York Times Co. | 1,398.5 | 1,380.1 | 1.3 | 79.1 | 78.0 | 1,768.9 |
| 7 | 7 | Dow Jones & Co. | 941.2 | 937.1 | 0.4 | 96.5 | 96.1 | 975.2 |
| 8 | 8 | E.W. Scripps | 780.1 | 770.2 | 1.3 | 66.1 | 65.3 | 1,180.0 |
| 9 | 9 | Cox Enterprises | 754.0 | 739.0 | 2.0 | 45.3 | 44.4 | 1,664.6 |
| 10 | 11 | Washington Post Co. | 726.7 | 682.7 | 6.4 | 52.9 | 49.7 | 1,372.9 |
| 11 | 10 | Hearst Corp. | 700.0 | 689.0 | 1.6 | 33.4 | 32.8 | 2,094.5 |
| 12 | 12 | Ingersoll Publications Co. | 669.5 | 645.0 | 3.8 | 100.0 | 96.3 | 669.5 |
| 13 | 14 | Thomson Corp. | 594.5 | 530.0 | 12.2 | 44.8 | 39.9 | 1,327.6 |
| 14 | 13 | MediaNews Group | 594.2 | 572.4 | 3.8 | 100.0 | 96.3 | 594.2 |
| 15 | 15 | Capital Cities/ABC | 490.9 | 468.9 | 4.7 | 10.3 | 9.8 | 4,767.0 |
| 16 | 17 | Central Newspapers | 436.2 | 417.6 | 4.5 | 100.0 | 95.7 | 436.2 |
| 17 | 16 | Advance Publications | 435.6 | 444.5 | (2.0) | 84.6 | 86.3 | 515.1 |
| 18 | 18 | Copley Newspapers | 384.5 | 373.9 | 2.8 | 97.9 | 95.2 | 392.9 |
| 19 | 19 | Freedom Newspapers | 367.0 | 353.0 | 4.0 | 81.6 | 78.5 | 449.7 |
| 20 | 20 | McClatchy Newspapers | 365.6 | 352.6 | 3.7 | 100.0 | 96.4 | 365.6 |
| 21 | 22 | Landmark Communications | 341.2 | 303.5 | 12.4 | 82.4 | 73.3 | 414.0 |
| 22 | 21 | Harte-Hanks Communications | 319.0 | 342.4 | (6.8) | 73.1 | 78.5 | 436.3 |
| 23 | 23 | Media General | 298.1 | 298.9 | (0.3) | 66.1 | 66.5 | 451.1 |
| 24 | 24 | Pulitzer Publishing Co. | 296.8 | 287.2 | 3.3 | 73.8 | 71.4 | 402.2 |
| 25 | 33 | News Corp. | 284.0 | 195.7 | 45.1 | 12.9 | 8.9 | 2,203.0 |
| 26 | 25 | Cowles Media Co. | 280.3 | 273.0 | 2.7 | 85.0 | 82.8 | 329.8 |
| 27 | 26 | Morris Communications | 265.5 | 258.3 | 2.8 | 67.2 | 65.3 | 395.1 |
| 28 | 27 | Chicago Sun-Times Co. | 249.5 | 235.4 | 6.0 | 100.0 | 94.3 | 249.5 |
| 29 | 28 | Donrey Publishing Co. | 247.0 | 234.0 | 5.6 | 58.7 | 55.6 | 421.0 |
| 30 | 31 | A.H. Belo Corp. | 238.0 | 220.1 | 8.1 | 57.1 | 52.8 | 417.1 |
| 31 | 29 | Donrey Media Group | 236.8 | 228.1 | 3.8 | 75.8 | 73.1 | 312.2 |
| 32 | 30 | Journal Communications | 232.0 | 222.2 | 4.4 | 81.2 | 77.8 | 285.7 |
| 33 | 32 | Seattle Times Co. | 200.0 | 200.0 | 0.0 | 100.0 | 100.0 | 200.0 |
| 34 | 35 | Times Publishing Co. | 181.0 | 169.1 | 7.0 | 86.6 | 80.9 | 209.0 |
| 35 | 34 | Media Communications | 180.6 | 174.0 | 3.8 | 77.6 | 74.8 | 232.7 |
| 36 | 36 | Lee Enterprises | 180.2 | 166.9 | 8.0 | 72.1 | 66.8 | 250.0 |
| 37 | 38 | Times Journal Co. | 166.5 | 157.1 | 6.0 | 100.0 | 94.4 | 166.5 |
| 38 | 39 | Howard Publications | 160.0 | 155.0 | 3.2 | 100.0 | 96.9 | 160.0 |
| 39 | 37 | Manchester Holdings | 153.0 | 164.0 | (6.7) | 77.3 | 82.9 | 198.0 |
| 40 | 40 | Macromedia | 152.7 | 147.1 | 3.8 | 84.7 | 81.6 | 180.2 |
| 41 | 41 | Dispatch Printing Co. | 140.0 | 140.0 | 0.0 | 68.2 | 68.2 | 205.4 |
| 42 | 42 | Multimedia Inc. | 137.9 | 135.2 | 2.0 | 35.8 | 35.1 | 384.7 |
| 43 | 45 | Berkshire Hathaway | 136.6 | 131.7 | 3.0 | 100.0 | 97.1 | 136.6 |
| 44 | 47 | CMP Publications | 133.4 | 113.0 | 18.1 | 84.7 | 71.7 | 157.5 |
| 45 | 43 | Providence Journal Co. | 133.0 | 133.0 | 0.0 | 51.2 | 51.2 | 259.8 |
| 46 | 44 | DTH Media | 130.0 | 132.5 | (1.9) | 100.0 | 101.9 | 130.0 |
| 47 | 46 | Oklahoma Publishing Co. | 127.0 | 125.0 | 1.6 | 31.8 | 31.3 | 399.8 |
| 48 | 48 | Park Communications | 89.9 | 87.3 | 3.0 | 59.0 | 57.2 | 152.5 |
| 49 | 49 | Forbes Inc. | 6.6 | 6.4 | 3.1 | 3.1 | 3.0 | 213.1 |

## Magazine companies

| Rank 1989 | Rank 1988 | Company | Magazine revenue 1989 | Magazine revenue 1988 | % chg | Magazine as % of total media 1989 | Magazine as % of total media 1988 | Total media 1989 |
|---|---|---|---|---|---|---|---|---|
| 1 | 1 | Time Warner | 1,855.0 | 1,750.0 | 6.0 | 40.5 | 38.3 | 4,581.2 |
| 2 | 2 | Hearst Corp. | 992.5 | 919.0 | 8.0 | 47.4 | 43.9 | 2,094.5 |
| 3 | 3 | Advance Publications | 841.9 | 745.6 | 13.0 | 29.2 | 25.9 | 2,881.7 |
| 4 | 5 | Thomson Corp. | 733.1 | 596.0 | 23.0 | 55.2 | 44.9 | 1,327.6 |
| 5 | 4 | Reed Elsevier | 713.8 | 589.8 | 21.0 | 38.1 | 31.5 | 1,872.4 |
| 6 | 6 | Reader's Digest | 589.4 | 600.4 | (1.8) | 100.0 | 101.9 | 589.4 |
| 7 | 7 | Reed Publishing USA | 586.8 | 496.8 | 18.1 | 60.8 | 51.4 | 965.4 |
| 8 | 8 | McGraw-Hill | 460.0 | 413.7 | 11.2 | 82.5 | 74.2 | 557.3 |
| 9 | 12 | International Data Group | 430.0 | 287.0 | 49.8 | 93.4 | 62.3 | 460.4 |
| 10 | 11 | Meredith Corp. | 417.1 | 365.1 | 14.2 | 78.5 | 68.7 | 531.4 |
| 11 | 10 | Rupert Murdoch | 396.0 | 393.0 | 0.8 | 39.9 | 39.6 | 992.5 |
| 12 | 9 | Capital Cities/ABC | 376.1 | 370.0 | 1.6 | 7.9 | 7.8 | 4,767.0 |
| 13 | 13 | Dun & Bradstreet | 310.0 | 285.0 | 8.8 | 29.5 | 27.1 | 1,051.0 |
| 14 | 14 | Times Mirror Co. | 305.9 | 298.5 | 2.5 | 10.9 | 10.6 | 2,807.1 |
| 15 | 15 | New York Times Co. | 285.8 | 248.1 | 15.2 | 16.2 | 14.0 | 1,768.9 |
| 16 | 16 | National Geographic Society | 255.5 | 245.4 | 4.1 | 100.0 | 96.0 | 255.5 |
| 17 | 17 | Gruner + Jahr | 250.0 | 230.0 | 8.7 | 23.9 | 22.0 | 1,045.8 |
| 18 | 18 | Petersen Publishing Co. | 214.8 | 186.7 | 15.0 | 100.0 | 86.9 | 214.8 |
| 19 | 21 | Hachette | 210.0 | 160.0 | 31.3 | 20.0 | 15.2 | 1,050.0 |
| 20 | 22 | Edgell Communications | 205.0 | 148.3 | 38.2 | 100.0 | 72.3 | 205.0 |
| 21 | 20 | Ziff-Davis Publishing | 200.0 | 190.0 | 5.3 | 19.1 | 18.1 | 1,047.1 |
| 22 | 23 | U.S. News & World Report | 170.2 | 141.8 | 20.0 | 100.0 | 83.3 | 170.2 |
| 23 | 24 | Newsweek Inc. | 150.0 | 140.0 | 7.1 | 14.3 | 13.3 | 1,050.0 |
| 24 | 24 | Crain Communications | 144.7 | 136.8 | 5.7 | 99.7 | 94.3 | 145.1 |
| 25 | 25 | Conde Nast | 144.0 | 131.0 | 9.9 | 13.7 | 12.5 | 1,050.0 |
| 26 | 26 | Playboy Enterprises | 126.1 | 120.4 | 4.7 | 85.4 | 81.5 | 147.7 |
| 27 | 27 | Rodale Press Inc. | 120.0 | 110.0 | 9.1 | 11.4 | 10.5 | 1,050.0 |
| 28 | 29 | Affiliated Publications | 79.5 | 62.0 | 28.2 | 15.4 | 12.0 | 515.1 |
| 29 | 28 | Ingersoll Publications | 75.0 | 70.0 | 7.1 | 11.2 | 10.5 | 669.5 |
| 30 | 31 | Cowles Media Co. | 49.5 | 42.0 | 17.9 | 15.0 | 12.7 | 329.8 |
| 31 | 30 | Dow Jones & Co. | 34.0 | 36.0 | (5.6) | 3.5 | 3.7 | 975.2 |
| 32 | 32 | Dun & Bradstreet Corp. | 31.0 | 30.0 | 3.3 | 2.9 | 2.8 | 1,051.0 |
| 33 | 33 | Forbes Inc. | 26.5 | 25.6 | 3.5 | 12.4 | 12.0 | 213.1 |
| 34 | 35 | CMP Publications | 24.1 | 20.0 | 20.5 | 15.3 | 12.7 | 157.5 |
| 35 | 34 | Fairchild Publications | 23.0 | 21.0 | 9.5 | 2.2 | 2.0 | 1,050.0 |
| 36 | 36 | Media General | 13.5 | 13.5 | 0.0 | 3.0 | 3.0 | 451.1 |
| 37 | 37 | Rolling Stone Co. | 7.1 | 7.1 | 0.0 | 1.7 | 1.7 | 420.0 |

Notes: Dollars are in millions. All figures are AA estimates. See Page S-3 for methodology. Compiled by: Sarah Peaker. Art chief: Kevin Brown


# Drugstore chains that ignore New York's Hispanics are in for a big headache.

New York's Hispanics spend more than $44 million annually on drug store items, everything from aspirin to hair spray, from tooth paste to nail polish.

Want to reach these health and beauty-minded consumers?

Advertise on WNJU 47, New York's #1 Spanish-language station.

It's as simple as that!

**WNJU 47**
*Telemundo in New York*

For more information, call Rosemarie Lieberman (212) 492-5603

Source: MOR 1987, New York Market.

# Media companies by broadcast

## TV companies

| Rank 1989 | Rank 1988 | Company | TV revenue 1989 | TV revenue 1988 | % chg | TV as % of total media 1989 | TV as % of total media 1988 | Total media 1989 |
|---|---|---|---|---|---|---|---|---|
| 1 | 1 | General Electric Co. | $3,392.0 | $3,638.0 | (6.8) | 100.0 | 100.0 | $3,392.0 |
| 2 | 2 | Capital Cities/ABC | 3,370.5 | 3,306.3 | 1.9 | 70.7 | 69.4 | 4,767.0 |
| 3 | 3 | CBS Inc. | 2,778.7 | 2,612.1 | 6.4 | 93.9 | 88.2 | 2,959.9 |
| 4 | 4 | News Corp. | 700.0 | 620.0 | 12.9 | 31.8 | 28.1 | 2,203.0 |
| 5 | 5 | Westinghouse Electric Corp. | 530.0 | 521.2 | 1.7 | 82.0 | 80.7 | 646.0 |
| 6 | 6 | Tribune Co. | 419.4 | 381.3 | 10.0 | 20.0 | 18.2 | 2,098.8 |
| 7 | 7 | Gillett Holdings | 367.0 | 354.0 | 3.7 | 100.0 | 96.5 | 367.0 |
| 8 | 8 | Gannett Co. | 319.0 | 305.5 | 4.4 | 9.1 | 8.7 | 3,518.2 |
| 9 | 9 | Cox Enterprises | 306.2 | 286.6 | 6.8 | 18.4 | 17.2 | 1,664.0 |
| 10 | 11 | Chris-Craft Industries | 246.7 | 230.6 | 7.0 | 100.0 | 93.5 | 246.7 |
| 11 | 10 | Hearst Corp. | 245.0 | 234.7 | 4.4 | 11.7 | 11.2 | 2,094.5 |
| 12 | 12 | E.W. Scripps | 208.6 | 197.2 | 5.8 | 17.7 | 16.7 | 1,180.0 |
| 13 | 13 | Washington Post Co. | 182.5 | 180.2 | 1.3 | 13.3 | 13.1 | 1,372.9 |
| 14 | 14 | A.H. Belo Corp. | 179.2 | 165.3 | 8.4 | 43.0 | 39.6 | 417.1 |
| 15 | 18 | Univision Holdings | 153.1 | 136.3 | 12.3 | 100.0 | 89.0 | 153.1 |
| 16 | 15 | Oklahoma Publishing Co. | 152.0 | 148.9 | 2.1 | 38.0 | 37.3 | 399.6 |
| 17 | 17 | LIN Broadcasting | 139.0 | 137.2 | 1.3 | 85.6 | 84.5 | 162.4 |
| 18 | 16 | H&C Communications | 137.5 | 137.5 | 0.0 | 98.2 | 98.2 | 140.0 |
| 19 | 19 | Great American Communications Co. | 129.6 | 134.1 | (3.4) | 65.6 | 67.8 | 197.7 |
| 20 | 20 | Multimedia Inc. | 125.9 | 125.9 | 0.0 | 32.7 | 32.7 | 384.7 |
| 21 | 21 | Meredith Corp. | 114.3 | 109.6 | 4.3 | 21.5 | 20.6 | 531.4 |
| 22 | 22 | Times Mirror Co. | 102.8 | 99.0 | 3.8 | 3.7 | 3.5 | 2,807.1 |
| 23 | 24 | Chronicle Publishing Co. | 99.0 | 96.0 | 3.1 | 23.5 | 22.8 | 421.9 |
| 24 | 23 | McGraw-Hill | 97.3 | 96.1 | 1.2 | 17.5 | 17.2 | 557.3 |
| 25 | 25 | Pulitzer Publishing Co. | 92.2 | 92.7 | (0.5) | 22.9 | 23.0 | 402.2 |
| 26 | 26 | Viacom International | 89.9 | 89.8 | 0.1 | 7.5 | 7.5 | 1,198.7 |
| 27 | 27 | Freedom Newspapers | 82.7 | 79.0 | 4.7 | 18.4 | 17.6 | 449.7 |
| 28 | 28 | Lee Enterprises | 69.8 | 67.9 | 2.8 | 27.9 | 27.2 | 250.0 |
| 29 | 29 | Bonneville International Corp. | 63.1 | 64.0 | (1.4) | 46.5 | 47.2 | 135.7 |
| 30 | 32 | New York Times Co. | 60.3 | 56.4 | 6.9 | 3.4 | 3.2 | 1,768.9 |
| 31 | 31 | Dispatch Printing Co. | 59.4 | 59.4 | 0.0 | 28.9 | 28.9 | 205.4 |
| 32 | 30 | Media General | 56.2 | 61.8 | (9.1) | 12.5 | 13.7 | 451.1 |
| 33 | 37 | Providence Journal Co. | 42.0 | 32.0 | 31.3 | 16.2 | 12.3 | 260.0 |
| 34 | 34 | Park Communications | 40.4 | 35.8 | 12.8 | 26.5 | 23.5 | 152.5 |
| 35 | 33 | Journal Communications | 39.3 | 38.8 | 1.3 | 13.8 | 13.6 | 285.7 |
| 36 | 36 | Ackerley Communications | 35.8 | 33.0 | 8.5 | 26.6 | 24.5 | 134.5 |
| 37 | 35 | Heritage Media Corp. | 33.3 | 34.2 | (2.6) | 20.2 | 20.7 | 165.0 |
| 38 | 38 | Macromedia | 27.5 | 26.3 | 4.6 | 15.3 | 14.6 | 180.2 |
| 39 | 40 | Landmark Communications | 26.0 | 23.2 | 12.1 | 6.3 | 5.6 | 414.0 |
| 40 | 39 | Harte-Hanks Communications | 24.3 | 26.0 | (6.5) | 5.6 | 6.0 | 436.3 |
| 41 | 41 | Wade Communications | 17.0 | 16.2 | 4.9 | 7.3 | 7.0 | 232.6 |
| 42 | 42 | Donrey Media Group | 9.7 | 9.6 | 1.0 | 3.1 | 3.1 | 312.2 |

## Radio companies

| Rank 1989 | Rank 1988 | Company | Radio revenue 1989 | Radio revenue 1988 | % chg | Radio as % of total media 1989 | Radio as % of total media 1988 | Total media 1989 |
|---|---|---|---|---|---|---|---|---|
| 1 | 1 | Capital Cities/ABC | 214.4 | 202.2 | 6.0 | 4.5 | 4.2 | 4,767.0 |
| 2 | 2 | CBS Inc. | 181.2 | 164.7 | 10.0 | 6.1 | 5.6 | 2,959.9 |
| 3 | 3 | Westinghouse Electric Corp. | 116.0 | 111.6 | 3.9 | 18.0 | 17.3 | 646.0 |
| 4 | 5 | Cox Enterprises | 94.3 | 80.8 | 16.7 | 5.7 | 4.9 | 1,664.0 |
| 5 | 4 | Gannett Co. | 88.3 | 85.0 | 5.0 | 2.5 | 2.4 | 3,518.2 |
| 6 | 6 | Bonneville International Corp. | 72.6 | 67.4 | 7.7 | 53.5 | 49.7 | 135.7 |
| 7 | 7 | Great American Communications Co. | 68.1 | 66.3 | 2.8 | 34.4 | 33.5 | 197.7 |
| 8 | 8 | Viacom International | 56.2 | 51.4 | 9.3 | 4.7 | 4.3 | 1,198.7 |
| 9 | 9 | Tribune Co. | 48.7 | 42.5 | 14.6 | 2.3 | 2.0 | 2,098.8 |
| 10 | 10 | Hearst Corp. | 25.5 | 28.3 | (9.9) | 1.2 | 1.4 | 2,094.5 |
| 11 | 11 | Park Communications | 22.2 | 26.5 | (16.2) | 14.6 | 17.4 | 152.5 |
| 12 | 14 | Heritage Media Corp. | 15.6 | 12.3 | 26.8 | 9.5 | 7.5 | 165.0 |
| 13 | 13 | Journal Communications | 14.4 | 13.9 | 3.0 | 5.0 | 4.9 | 285.7 |
| 14 | 16 | Ackerley Communications | 14.3 | 11.0 | 30.0 | 10.6 | 8.2 | 134.5 |
| 15 | 12 | E.W. Scripps | 14.0 | 16.9 | (17.2) | 1.2 | 1.4 | 1,180.0 |
| 16 | 15 | Pulitzer Publishing Co. | 13.2 | 11.1 | 18.9 | 3.3 | 2.8 | 402.2 |
| 17 | 17 | Multimedia Inc. | 11.0 | 11.0 | 0.0 | 2.8 | 2.8 | 384.7 |
| 18 | 18 | Oklahoma Publishing Co. | 7.6 | 7.1 | 7.0 | 1.9 | 1.8 | 399.6 |
| 19 | 19 | New York Times Co. | 5.5 | 6.1 | (9.8) | 0.3 | 0.3 | 1,768.9 |
| 20 | 21 | Dispatch Printing Co. | 3.9 | 2.9 | 34.5 | 1.9 | 1.4 | 205.4 |
| 21 | 20 | Landmark Communications | 3.6 | 4.7 | (23.4) | 0.8 | 1.1 | 414.0 |
| 22 | 22 | H&C Communications | 2.5 | 2.5 | 0.0 | 1.8 | 1.8 | 140.0 |
| 23 | 23 | Triple Crown Communications | 0.4 | 0.4 | 11.0 | 0.3 | 0.3 | 145.1 |

Notes: Dollars are in millions. All figures are AA estimates. See Page S-3 for methodology.

Compiled by: Sarah Polster. AA chart: Kevin Brown

# Top broadcast property deals

| Property/ies | Buyer | Seller | Price |
|---|---|---|---|
| WCRX-FM/WCPT, Washington; WLLZ-FM, Detroit; | | Legacy Broadcasting | |
| WSMV-TV, Nashville | Cook-Inlet | Gillett Holdings | 110 |
| delphia; WDCA-TV, Washington; KTXH-TV, Hous- | | | |
| KJOI-FM, Los Angeles (renamed KXEZ); KHOW/- | Viacom International | Command Communications | 101.5 |
| WKYC-TV, Cleveland (51%) | Multimedia | General Electric Co. | 65 |
| KNTV-TV, San Jose | Granite Broadcasting | Landmark Communications | 60 |
| KQQA-FM, Houston; KJOY-FM, San Diego | Command Communications | Westinghouse | 45 |

Notes: Dollars are in millions.

Compiled by: R. Craig Endicott

# Sagging broadcast seen rebounding

The days when TV stations were seen as "cash cows" are over.

In fact, the revenue stream of the broadcast industry—TV *and* radio—has trickled to far below the double-digit growth enjoyed up to two years ago.

The 43 media companies with TV properties on the *Ad Age* 100 combined to show only a 1.8% gain in revenues—a figure somewhat misleading because of the impact on the group of No. 1 General Electric Co.

GE, with $3.4 billion in net revenue generated by its NBC-TV Network and owned-and-operated stations, represents 22% of the $15.4 billion TV aggregate.

Without GE, the other 42 companies collectively would have grown 4.6%. GE revenues dropped because 1988 figures were inflated by the NBC-aired Olympics, which powered NBC to a 12.2% annual gain in 1988.

In general, TV's fortunes are expected to revive in 1990. First-quarter network TV results showed advertising at $2.6 billion, up 13.6% compared with the first quarter of 1989. Spot TV had a modest 3.4% gain while syndication, which includes Fox TV Network, ballooned 32%, according to Arbitron's Broadcast Advertisers Reports.

Showing particular strength among the top 10 TV companies in 1989 was News Corp. with estimated growth of 12.9% largely tied to Fox TV Network, and Tribune Co., up 10%—a credit to its strong stations in New York, Los Angeles and Chicago.

Buyouts slowed to a trickle. The only major group moving in '89 was TVX Broadcast, a unit of six independent TV stations, 49% of which was bought by Paramount Communications. One of the largest single station deals was Cook-Inlet's $125 million purchase of WSMV-TV, Nashville, from Gillett Holdings.

The 23 media companies active in radio among the Top 100 returned net revenues of $1.1 billion in 1989, up 6.6%, but below the 11.1% growth recorded for 1988. The industry grew 6.7% to $8.3 billion in 1989 ad revenues.

If national spot ad totals for the first quarter of 1990 establish a pattern this year, radio owners are in for tough times. Ad revenues plunged 42.2% from the prior year period, to $192.9 million—most of the drop from spot's two leading categories, food products and automotive. □


Banks that ignore New York's Hispanics may be robbing themselves.

Approximately half of New York's Hispanics have a checking and/or savings account in one of New York's banks.

Want to reach these bank-minded New Yorkers?

Advertise on WNJU 47, New York's #1 Spanish-language station.

It's as simple as that!

WNJU 47
Telemundo in New York

For more information, call Rosemarie Lieberman (212) 492-5603

Source: MOR 1987, New York Market.


BEST AVAILABLE COPY

# Yellow Pages leaders gain 8% to $7.7 billion; GTE on top

By Sarah Polster

Revenues of the top 10 Yellow Pages publishers continued their steady climb in 1989, rising 8% to $7.7 billion in *Advertising Age's* 100 Leading Media Companies.

The top 10 companies represent about 93% of total Yellow Pages advertising, which the Yellow Pages Publishers Association places at $8.3 billion, up 6.4% from 1988. The association figure also includes advertising in white pages, as do *Ad Age's* figures.

Communications Trends, a Yellow Pages tracking service, predicts the industry will grow 7.3% in 1990 to $8.3 billion—an estimate that excludes white pages.

In this medium, white pages are just one of the components in the mix that is no longer "yellow." Talking Yellow Pages and image processing already are contributing promising revenue streams.

GTE remained the leader with revenues of $1.4 billion. Nynex entered the ranking for the first time—it would not divulge its 1988 Yellow Pages revenues—landing in the No. 5 spot based on 1989 revenues of $818 million.

The only other change was Southwestern Bell's drop from No. 5 in 1988 to No. 7 in 1989.

The only year-to-year decline in Yellow Pages revenues among the top 10 was the 1.1% drop by Donnelley Directory, attributed by Donnelley to the expiration of a sales agency contract with Chesapeake & Potomac Telephone Co. □

## Top 10 Yellow Pages cos. in 1988

| Rank | Company | Yellow Pages revenue | Total rev. |
|---|---|---|---|
| 1 | GTE | $1,430.0 | $17,400.0 |
| 2 | BellSouth | 1,053.5 | 14,227.7 |
| 3 | Bell Atlantic | 902.0 | 11,448.6 |
| 4 | Pacific Telesis, Pacific Bell Directory | 867.0 | 9,593.0 |
| 5 | Nynex | 818.0 | 13,211.0 |
| 6 | U.S. West | 736.5 | 9,691.0 |
| 7 | Southwestern Bell | 732.0 | 8,729.8 |
| 8 | Ameritech | 529.9 | 10,211.3 |
| 9 | Dun & Bradstreet, R.H. Donnelley | 437.0 | 4,321.8 |
| 10 | United Telecom | 215.2 | 7,549.0 |

**Notes:** Dollars are in millions. Yellow Pages revenue per company includes the following: 1. GTE directory revenues; 2. Revenues from directory publishing and advertising; 3. Total directory operations revenues; 4. Directory advertising only; 5. White and Yellow Pages; 6. U.S. West Marketing Resources Group; U.S. West Direct; Trans Western Publishing; U.S. Marketing Resources Co.; 7. Various directories, including Yellow Pages and white pages; 8. Estimated directory revenues; 9. Total publishing revenues from Donnelley Directory and Donnelley Information Publishing; 10. DirectoriesAmerica.


# Auto accessory chains that ignore New York's Hispanics are in for a bumpy ride.

New York's Hispanics spend more than $31 million annually on auto accessories—everything from anti-freeze to oil filters, from tires to mufflers.

Want to reach these car-minded consumers?

Advertise on WNJU 47, New York's #1 Spanish-language station.

It's as simple as that!

WNJU 47
Telemundo in New York

For more information, call Rosemarie Lieberman (212) 492-5603

Source: SRC's "1988 New York Hispanic Market" report.


# Cable gains 17.9%

## Growth pace slows, pay cable is struggling

Cable continues to outpace growth in other media, although possible re-regulation and tighter financial markets are slowing acquisition activity and system upgrading.

Total cable revenues of the 34 companies with cable operations among *Ad Age's* 100 Leading Media Companies increased 17.9% to $13.1 billion, slowing down from 23.9% growth a year ago.

Total industrywide cable ad spending rose 28.5% to more than $1.9 billion in 1989, according to Cabletelevision Advertising Bureau. Subscription fees still contribute more to total cable revenues than advertising, which is becoming increasingly important as subscriber counts flatten.

Newly merged Time Warner claimed the No. 1 cable spot among the *Ad Age* 100, the same position held by its predecessor Time Inc. in 1988. Tele-Communications Inc., with 38% revenue growth, was No. 2 again.

TCI continued to add properties, buying 50% of Viacom's Showtime Networks for $225 million, splitting the purchase of Cooke Media's cable with Adelphia Communications and others for $1.6 billion and snapping up a slice of Centel Cable.

Perhaps fearing proposed cable regulations that would prohibit cable operators from owning systems that control more than 15% of the national market, this January TCI split into two publicly traded companies covering cable and programming services.

The only new entry to the cable chart was Whittle Communications, whose controversial Educational Network brought in $10.9 million. Advertising on its Channel One contributed the revenues, but in early 1990 two other services were added to the network—the Educators Channel and the Classroom Channel.

New pay channels such as The Comedy Channel and HA! aren't faring as well as Whittle's niches. Their receptivity has been low, leading their respective parents, Time Warner and Viacom, to merge the two channels later this year.

Pay cable in general struggled through the year, dropping 5% in average weekly viewership, according to CAB. Basic cable viewership is growing the fastest; average weekly viewing for cable households went up 13% in 1989.

During the year, major deals included Centel Corp.'s divestiture of its cable systems for $1.4 billion to various MSOs including Time Warner and TCI.

Cooke Media Group, last year's No. 18 on the cable chart, dropped off the list after selling its cable systems to TCI and Adelphia for $1.6 billion.

Howard Publications sold its only cable property, a partial share of Hearst Cable. Early this year, Cablevision Systems snapped up major Long Island and Cleveland suburban systems from Viacom for $550 million.

Chronicle Publishing Co. outpaced all other MSO operators in year-to-year revenue cable growth at 39%, just ahead of TCI's 38%, Hearst Corp.'s 37% and Turner Broadcasting System's 36%. □

—*Sarah Polster*

## Companies with cable channels

| Parent | Channel | Subscribers 1989 | Subscribers 1988 |
|---|---|---|---|
| Capital Cities/ABC* | ESPN | 54.0 | 50.0 |
| General Electric | CNBC | 14.0 | NA |
| Landmark Communications | Weather Channel | 41.0 | 38.0 |
| Oklahoma Publishing Co. | Nashville Network | 49.0 | 43.0 |
| Playboy Enterprises | Playboy Channel | 0.4 | 0.5 |
| Time Warner | Cinemax | 6.0 | 6.0 |
| | HBO | 17.0 | 17.0 |
| | Comedy Channel*** | 6.0 | NA |
| Turner Broadcasting | CNN | 53.2 | 48.4 |
| | Headline News | 40.4 | 34.2 |
| | SuperStation TBS | 51.0 | 47.0 |
| | TNT | 35.0 | 23.0 |
| Viacom | Showtime | 7.2 | 9.7 |
| | The Movie Channel | 3.2 | 2.6 |
| | MTV:Music Television | 49.9 | 44.2 |
| | Nickelodeon | 50.0 | 43.3 |
| | VH-1 | 35.9 | 29.6 |
| | HA!*** | NA | NA |
| | Lifetime** | 46.0 | 42.0 |

**Notes:** Subscribers are in millions. Only companies among the 100 leading media companies are listed. TCI bought 50% of Viacom's Showtime Networks. * Capital Cities/ABC owns 80% of ESPN. ** Viacom owns 33.3% of Lifetime. *** merger pending. **Source:** Cabletelevision Advertising Bureau, Cable TV Fact Book, 1990 edition.

## Media companies by cable revenue

| Rank 1989 | Rank 1988 | Company | Cable TV revenue 1989 | Cable TV revenue 1988 | Cable TV revenue % chg | Cable TV as % of total media 1989 | Cable TV as % of total media 1988 | Total media 1989 |
|---|---|---|---|---|---|---|---|---|
| 1 | 1 | Time Warner | $2,720.0 | $2,390.0 | 13.8 | 58.5 | 52.2 | $4,575.0 |
| 2 | 2 | TCI | 2,353.0 | 1,705.1 | 38.0 | 100.0 | 72.5 | 2,353.0 |
| 3 | 3 | Viacom International | 1,052.6 | 972.6 | 8.2 | 87.8 | 81.1 | 1,198.7 |
| 4 | 4 | Continental Cablevision | 780.0 | 622.0 | 25.4 | 100.0 | 79.7 | 780.0 |
| 5 | 5 | Turner Broadcasting System | 728.7 | 537.6 | 35.5 | 100.0 | 73.8 | 728.7 |
| 6 | 8 | SCI Holdings | 516.0 | 472.1 | 9.3 | 100.0 | 91.5 | 516.0 |
| 7 | 6 | Rupert Murdoch | 508.5 | 471.8 | 8.0 | 30.6 | 28.4 | 1,664.0 |
| 8 | 10 | Comcast Corp. | 502.0 | 404.1 | 24.2 | 100.0 | 80.5 | 502.0 |
| 9 | 9 | Hearst Argyle Television Co. | 501.3 | 513.6 | (2.4) | 100.0 | 102.5 | 501.3 |
| 10 | 7 | Cablevision Systems Corp. | 492.7 | 493.5 | (0.2) | 100.0 | 100.2 | 492.7 |
| 11 | 11 | Times Mirror Co. | 332.5 | 282.7 | 17.6 | 11.6 | 10.1 | 2,865.3 |
| 12 | 12 | Capital Cities/ABC | 315.1 | 241.1 | 30.7 | 6.6 | 5.1 | 4,767.0 |
| 13 | 13 | Tribune Broadcasting | 294.8 | 229.4 | 28.5 | 10.2 | 8.0 | 2,881.2 |
| 14 | 14 | Sammons Communications | 239.0 | 215.8 | 10.8 | 100.0 | 90.3 | 239.0 |
| 15 | 15 | Post-Newsweek Stations | 231.8 | 188.0 | 23.3 | 100.0 | 81.1 | 231.8 |
| 16 | 16 | TeleCable Corp. | 204.0 | 180.0 | 13.3 | 100.0 | 88.2 | 204.0 |
| 17 | 19 | Young Broadcasting Corp. | 196.4 | 118.5 | 65.8 | 100.0 | 60.3 | 196.4 |
| 18 | 17 | Cablevision Industries Corp. | 185.0 | 170.2 | 8.7 | 100.0 | 92.0 | 185.0 |
| 19 | 20 | A.H. Belo Corp. | 177.3 | 149.6 | 18.4 | 13.8 | 11.7 | 1,286.5 |
| 20 | 18 | Houston Industries | 150.4 | 162.9 | (7.7) | 100.0 | 108.3 | 150.4 |
| 21 | 22 | Newhouse Newspapers | 131.3 | 116.1 | 13.1 | 92.5 | 81.8 | 292.2 |
| 22 | 21 | Washington Post Co. | 129.3 | 115.2 | 12.2 | 9.4 | 8.4 | 1,372.9 |
| 23 | 24 | Providence Journal Co. | 111.5 | 96.8 | 15.2 | 17.8 | 15.5 | 626.2 |
| 24 | 23 | Multimedia Inc. | 109.9 | 101.9 | 7.9 | 28.6 | 26.5 | 384.7 |
| 25 | 25 | Gannett Co. | 98.7 | 79.8 | 23.7 | 2.1 | 1.7 | 4,787.0 |
| 26 | 26 | Media General | 83.3 | 70.8 | 17.7 | 18.5 | 15.7 | 451.1 |
| 27 | 27 | Knight-Ridder Inc. | 74.6 | 64.6 | 15.5 | 3.6 | 3.1 | 2,071.5 |
| 28 | 29 | Landmark Communications | 43.2 | 32.2 | 34.2 | 10.4 | 7.8 | 414.0 |
| 29 | 28 | Scripps Howard | 35.0 | 33.4 | 4.8 | 10.9 | 10.4 | 320.8 |
| 30 | 30 | Playboy Enterprises | 21.6 | 23.4 | (7.7) | 14.6 | 15.8 | 147.7 |
| 31 | 31 | Cox Enterprises | 17.5 | 15.1 | 15.9 | 1.3 | 1.1 | 1,350.0 |
| 32 | 32 | Dispatch Media Group | 11.4 | 10.3 | 10.7 | 3.7 | 3.3 | 312.2 |
| 33 | 33 | Freedom Newspapers | 10.3 | 9.3 | 10.8 | 3.3 | 3.0 | 312.0 |
| 34 | 34 | Copley Newspapers | 8.4 | 7.4 | 13.5 | 2.1 | 1.9 | 392.9 |

**Notes:** Dollars are in millions. All figures are AA estimates. See Page 5-3 for methodology. Compiled by: Sarah Polster. AA chart: Kevin Brown

# MEDIAWORKS

## MAY AD RESULTS

# Magazine ad pages continue downhill run

**By Scott Donaton**

Magazine ad pages took their steepest plunge of the year in May, following an April that had some publishers predicting the end of the ad page drought.

Ad pages fell 6.5% to 15,301.86 for the month, down more than 1,000 pages from the year before, according to Publishers Information Bureau. Year-to-date pages were off 3.2%, to 71,399.28.

Following a 3.5% drop in the first quarter, page counts rose a slim 0.4% in April, boosting some publishers' hopes. But May's dismal performance may negate that optimism.

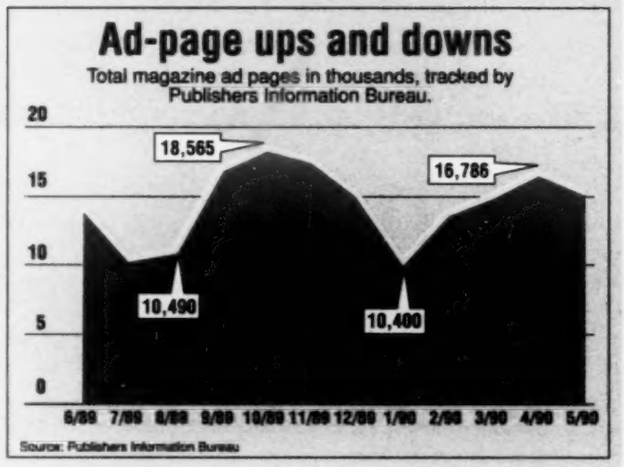
Advertising softness has already led to a number of magazines folding or going on the selling block. Industry consultants predict a major shakeout.

Last year's ad page leader, *Business Week* took the top spot for the first time this year despite dropping 13.1% in pages. The McGraw-Hill magazine carried 1,551.37 ad pages through May, compared to 1,785.54 in the same period last year.

*Forbes*, one of the few titles to see ad pages rise in the first five months, ran a close second with 1,502.73 pages, a 7.5% gain. Rival *Fortune* carried 1,245.63 pages, up 2.2%.

Time Warner's *People* continued its downward slide with 1,428.27 pages, a 10.1% drop. Rupert Murdoch's *TV Guide*, meanwhile, saw pages fall 12% to 1,287.53 pages through May.

The top newsweeklies all posted declines for the year through May. *Time* was down 8.2% with 1,054.2 ad pages; *Newsweek* was off 12.2% with 902.78 pages; and *U.S. News & World Report* carried 744.3 pages, a 6% drop.




CYNTHIA WATSON

In the women's service field, Hearst Corp.'s *Good Housekeeping* passed *Family Circle* to take the ad page lead in the category with 679.43 ad pages, up 8.7%. Hearst's *Redbook* was the only other women's service title to register a gain with 464.31 ad pages, up 0.1%.

On the down side, *Family Circle* posted an 18.3% decline with 660.5 pages, and *Woman's Day* carried 636.74 pages through May, down 18.1%. *Better Homes & Gardens* was off 12% with 527.76 ad pages. *McCall's* had 404.01 pages, down 13.7%. *Ladies' Home Journal* dipped only slightly, down 0.7% with 648.97 ad pages.

Among men's magazines, *Sports Illustrated* carried 1,057.67 pages, a 17.2% decline; *GQ* carried 765.23 ad pages, down 8.4%; and *Esquire*, with 488.07 pages, was off 1.7%. *Playboy's* pages fell 9.6% to 285.32 pages. *Penthouse* was up 4.6% with 255.83 pages.

Among magazines posting double-digit ad page gains through May: *Entrepreneur* (845.58 pages, up 10.3%); *Popular Photography* (495.71 pages, up 23.9%); *Financial World* (465.78 pages, up 41.4%); *Conde Nast Traveler* (457.93 pages, up 17.5%); *Bon Appetit* (453.86 pages, up 12.9%); *HG* (452.71 pages, up 18.2%); *Parenting* (287.26 pages, up 21.2%); *Child* (236.37 pages, up 13.9%); *European Travel & Life* (220.78 pages, up 10.6%); *Spin* (209.29 pages, up 21.4%); *Cooking Light* (184.37 pages, up 20.1%); *Health* (179.05 pages, up 13.2%); *Decorating Remodeling* (164.19 pages, up 79.3%); *Practical Homeowner* (157.83 pages, up 60.9%); and *National Geographic* (121.16 pages, up 12.5%). □

## Magazine ad page leaders

Publishers Information Bureau figures through May 1990.

| Rank | Magazine | Pages | % chg | Dollars | % chg |
|---|---|---|---|---|---|
| 1 | Business Week | 1,551.37 | (13.1) | 89,955,377 | (8.0) |
| 2 | Forbes | 1,502.73 | 7.5 | 85,439,388 | 14.0 |
| 3 | People | 1,428.27 | (10.1) | 194,254,317 | (1.2) |
| 4 | Bride's | 1,294.98 | 5.5 | 22,900,540 | 14.9 |
| 5 | TV Guide | 1,287.53 | (12.0) | 138,652,378 | (4.6) |
| 6 | Fortune | 1,245.63 | 2.2 | 89,313,087 | 8.2 |
| 7 | Vogue | 1,201.94 | (11.7) | 44,293,940 | 10.3 |
| 8 | The Economist | 1,101.48 | 16.9 | 9,568,324 | 33.3 |
| 9 | Sports Illustrated | 1,057.67 | (17.2) | 132,021,584 | (6.8) |
| 10 | Time | 1,054.20 | (8.2) | 144,291,128 | (8.7) |
| 11 | New York Magazine | 1,050.95 | (13.8) | 16,724,378 | (8.7) |
| 12 | Modern Bride | 1,025.24 | 5.5 | 16,979,500 | 10.4 |
| 13 | Cosmopolitan | 940.90 | (6.1) | 55,699,296 | 2.9 |
| 14 | The New Yorker | 910.82 | 6.0 | 23,275,894 | 17.2 |
| 15 | Newsweek | 902.78 | (12.2) | 89,537,102 | (3.8) |
| 16 | Elle | 892.00 | (3.2) | 28,057,896 | 1.9 |
| 17 | Entrepreneur | 845.58 | 10.3 | 8,083,392 | 41.9 |
| 18 | Rolling Stone | 766.12 | 0.2 | 27,248,609 | 4.4 |
| 19 | GQ | 765.23 | (8.4) | 18,720,548 | (6.1) |
| 20 | Glamour | 760.79 | (10.1) | 38,027,315 | (4.6) |
| 21 | U.S. News & World Report | 744.30 | (6.0) | 60,026,799 | 2.3 |
| 22 | Architectural Digest | 738.67 | (3.3) | 19,865,810 | 3.4 |
| 23 | American Way | 720.91 | (3.9) | 9,484,310 | 17.9 |
| 24 | Yachting | 710.83 | (0.1) | 4,302,899 | 1.0 |
| 25 | Good Housekeeping | 679.43 | 8.7 | 63,301,899 | 19.0 |
| 26 | Family Circle | 660.50 | (18.3) | 53,978,357 | (7.1) |
| 27 | Sunset | 651.22 | (5.7) | 20,303,378 | 4.1 |
| 28 | Ladies' Home Journal | 648.97 | (0.7) | 45,544,151 | 18.8 |
| 29 | Women's Day | 636.74 | (18.1) | 45,572,083 | (17.8) |
| 30 | Mademoiselle | 631.71 | (8.7) | 20,592,299 | 0.4 |
| 31 | Town & Country | 628.36 | (2.6) | 15,200,566 | 11.5 |
| 32 | Travel & Leisure | 620.42 | (8.0) | 25,327,680 | 12.2 |
| 33 | Golf Digest | 600.44 | (1.7) | 29,656,880 | 1.8 |
| 34 | W | 598.29 | (6.1) | 13,709,351 | 7.1 |
| 35 | Parents | 567.62 | (0.5) | 23,971,799 | 9.0 |
| 36 | Golf Magazine | 564.33 | (13.8) | 17,431,191 | (1.5) |
| 37 | Harper's Bazaar | 562.12 | 1.8 | 15,479,021 | 9.2 |
| 38 | Salt Water Sportsman | 516.85 | (19.9) | 3,774,082 | (17.2) |
| 39 | Skin Diver | 514.46 | 0.3 | 5,400,089 | 5.2 |
| 40 | Texas Monthly | 508.41 | 7.8 | 6,303,088 | 9.8 |
| 41 | Self | 505.94 | (1.0) | 21,360,225 | 20.3 |
| 42 | Southern Living | 549.53 | (7.8) | 26,960,283 | (1.7) |
| 43 | Seventeen | 547.23 | (2.3) | 16,236,680 | (1.3) |
| 44 | Vanity Fair | 539.74 | (0.3) | 18,916,695 | 23.3 |
| 45 | Better Homes & Gardens | 527.76 | (12.0) | 88,334,367 | (7.3) |
| 46 | Gourmet | 527.54 | 6.5 | 14,089,864 | 17.2 |
| 47 | Muscle & Fitness | 522.28 | (23.0) | 6,919,248 | (5.6) |
| 48 | Metropolitan Home | 514.66 | (4.7) | 16,146,231 | 2.4 |
| 49 | Money | 512.83 | (0.1) | 31,471,223 | (1.1) |
| 50 | Bicycling | 498.30 | (8.7) | 6,915,395 | 8.8 |
| 51 | Popular Photography | 495.71 | 23.9 | 11,894,957 | 39.7 |
| 52 | Esquire | 488.07 | (1.7) | 14,948,491 | 5.9 |
| 53 | Car & Driver | 488.41 | (8.2) | 10,182,514 | (12.6) |
| 54 | Ebony | 477.39 | (6.3) | 16,667,677 | 2.9 |
| 55 | San Francisco Focus | 477.00 | (9.1) | 8,194,269 | 3.7 |
| 56 | Reader's Digest | 470.17 | 2.7 | 46,462,770 | 9.2 |
| 57 | Financial World | 465.78 | 41.4 | 10,795,492 | 71.9 |
| 58 | Redbook | 464.31 | 0.1 | 58,933,889 | (6.3) |
| 59 | Conde Nast Traveler | 457.93 | 17.5 | 12,799,888 | 41.2 |
| 60 | Country Living | 454.16 | (7.3) | 18,751,480 | (2.0) |
| 61 | Bon Appetit | 453.86 | 12.9 | 13,477,018 | 16.7 |
| 62 | HG | 452.71 | 18.2 | 11,207,980 | 29.7 |
| 63 | Ski | 441.70 | (9.6) | 17,858,444 | (1.6) |
| 64 | Retail & Trade | 435.21 | (11.2) | 12,818,888 | (17.7) |
| 65 | Mirabella | 430.08 | 1,000.0 | 6,670,420 | 100.0 |
| 66 | Jet | 429.71 | (11.6) | 7,339,551 | (1.9) |
| 67 | Smithsonian | 412.61 | (4.2) | 17,406,891 | (0.1) |
| 68 | Working Woman | 410.99 | (8.2) | 12,436,888 | (1.8) |
| 69 | McCall's | 404.01 | (13.7) | 38,144,547 | (4.6) |
| 70 | Essence | 398.12 | 2.0 | 8,669,888 | 11.0 |
| 71 | Seventeen | 392.75 | (17.3) | 7,761,291 | (5.4) |
| 72 | New Woman | 385.66 | (16.4) | 6,610,472 | (11.0) |
| 73 | Art & Antiques | 381.51 | 0.4 | 8,217,239 | 21.1 |
| 74 | Four Wheeler | 379.39 | (4.8) | 2,913,788 | 3.0 |
| 75 | Field & Stream | 363.75 | (19.3) | 14,468,945 | (21.0) |
| 76 | Delta Sky | 357.45 | (7.3) | 8,033,888 | (1.3) |
| 77 | Popular Mechanics | 341.88 | (22.5) | 10,739,888 | (19.6) |
| 78 | Outdoor Life | 340.88 | (28.4) | 10,007,170 | (22.0) |
| 79 | Motor Trend | 340.09 | (23.2) | 12,174,380 | (16.7) |
| 80 | Sports Afield | 338.94 | (5.8) | 6,441,888 | 5.3 |
| 81 | Hot Rod | 336.18 | (28.9) | 7,647,091 | (27.0) |
| 82 | California | 333.21 | 12.2 | 4,888,484 | 21.5 |
| 83 | Black Enterprise | 330.41 | (2.0) | 5,333,710 | 7.8 |
| 84 | Southern Accents | 328.04 | (1.2) | 5,344,540 | 6.8 |
| 85 | Popular Science | 320.70 | (23.5) | 8,670,110 | (22.3) |
| 86 | Yachting | 318.03 | (2.4) | 3,700,888 | 8.0 |
| 87 | 1,001 Home Ideas | 316.07 | 0.7 | 6,700,888 | 20.0 |
| 88 | House Beautiful | 315.69 | (5.8) | 11,484,888 | 8.0 |
| 89 | Entertainment Weekly | 314.58 | 1,000.0 | 8,000,000 | 100.0 |
| 90 | Cleveland | 312.62 | (6.4) | 5,000,000 | 8.0 |
| 91 | US | 310.87 | 2.1 | 5,000,000 | 8.0 |
| 92 | Jr. | 309.87 | 2.1 | 5,000,000 | 8.0 |
| 93 | Weight Watchers | 309.87 | 2.1 | 5,000,000 | 8.0 |
| 94 | Premiere | 309.87 | 2.1 | 5,000,000 | 8.0 |

## NEWSSTAND

*Print advertising opportunities.*

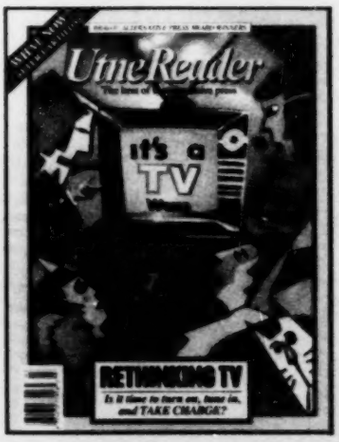
**Practical Horseman** and **Performance Horseman**, Unionville, Pa., "General store" special advertising sections, September issues; ad close: July 1. B&w one-ninth page (combination buy): $370.

**Cooking Light**, New York, "Spas and resorts" special editorial section, September/October issue; ad close: July 2. B&w one-sixth page: $2,320.

**People**, New York, "Fall fashion portfolio" special advertising section, Sept. 10 issue; ad close: July 2. Color page: $28,115.

**Prevention**, Emmaus, Pa., "High nutrition: past, present and future" special editorial section, September issue; ad close: July 2. B&w page: $29,585; color page: $38,760.

**Rolling Stone**, New York, "Four decades of rock: the '60s" special editorial section, Aug. 23 issue; ad close: July 2. B&w page: $32,305; color page: $43,040.




**Southern Living**, Birmingham, Ala., "All-South 1990" special editorial section, September issue; ad close: July 2. B&w page: $40,460; color page: $57,060.

**Utne Reader**, Minneapolis, "Fall smorgasbord" special editorial supplement, September/October issue; ad close: July 3. B&w one-ninth page: $625.

**Tennis**, Trumbull, Conn., "Tennis USTA" special editorial supplement, September issue; ad close: July 5. Color page: $16,000.

**New York Woman**, New York, "How we live" special editorial section, September issue; ad close: July 6. B&w page: $8,239; color page: $11,770.

**The Sporting News**, St. Louis, "All-star game" special editorial section, July 23 issue; ad close: July 6. B&w page: $15,990; color page: $20,140.

**Charleston**, Charleston, S.C., "Real estate" special advertising supplement, September/October issue; ad close: July 8. Color page: $2,500. □

*Wayne Walley coordinates MediaWorks.*

# CONSUMER MAGAZINE AD LINAGE

| | May 1990 | May 1989 | Year-to-date 1990 | Year-to-date 1989 |
|---|---|---|---|---|
| **■ Auto/cycle/rec.vehicles** | | | | |
| AutoWeek (52X) | 149.9 | 210.9 | 738.6 | 762.7 |
| Car & Driver C. | 109.8 | 124.8 | 486.4 | 518.5 |
| Car Collector & Car Classics | 16.6 | 16.5 | 81.2 | 84.2 |
| Car Craft | 80.5 | 88.2 | 333.5 | 358.2 |
| Circle Track | 97.1 | 106.7 | 445.0 | 446.7 |
| Cycle | 51.5 | 67.2 | 207.4 | 244.5 |
| Cycle World | 53.5 | 63.1 | 233.8 | 227.0 |
| Dirt Rider | 48.6 | 36.2 | 196.2 | 163.2 |
| Dune Buggies & Hot VWs | 71.8 | 68.4 | 339.7 | 336.0 |
| Family Motor Coaching | 164.3 | 196.9 | 818.7 | 922.1 |
| 4 Wheel & Off-Road | 88.1 | 99.3 | 371.4 | 398.6 |
| Four Wheeler C. | 90.8 | 91.9 | 379.3 | 397.0 |
| Hot Rod C. | 78.8 | 121.4 | 336.2 | 472.5 |
| Motorcyclist | 59.1 | 56.8 | 207.9 | 228.4 |
| Motor Trend C. | 71.2 | 129.4 | 340.1 | 442.9 |
| Motorhome | 102.8 | 97.1 | 478.3 | 473.3 |
| Rider | 50.9 | 45.3 | 173.2 | 186.8 |
| Road & Track C. | 106.0 | 124.2 | 435.2 | 490.1 |
| Trailblazer | 40.0 | 58.0 | 225.0 | 289.0 |
| Trailer Life | 93.3 | 112.8 | 451.3 | 490.9 |
| **Total Group** | **1,624.6** | **1,915.1** | **7,276.3** | **7,934.4** |
| **% change** | **-15.2%** | | **-8.3%** | |
| **■ Boating & yachting** | | | | |
| Boating | 116.2 | 151.5 | 737.2 | 868.5 |
| Chesapeake Bay | 57.0 | 59.3 | 221.2 | 259.2 |
| Cruising World | 109.7 | 115.4 | 583.4 | 603.8 |
| Lakeland Boating (11X) | 87.0 | 105.6 | 437.0 | 505.6 |
| Motor Boating & Sailing | 176.4 | 152.0 | 691.1 | 855.4 |
| Sail | 105.4 | 117.5 | 605.9 | 614.8 |
| Trailer Boats (11X) | 66.2 | 85.9 | 383.7 | 441.4 |
| Western Boatman | 31.3 | 50.3 | 158.4 | 152.1 |
| Yachting C. | 136.7 | 123.6 | 710.8 | 711.5 |
| **Total Group** | **885.9** | **961.1** | **4,528.8** | **5,012.3** |
| **% change** | **-7.8%** | | **-9.6%** | |
| **■ Civic/fraternal** | | | | |
| Elk (10X) | 14.1 | 10.9 | 80.3 | 75.7 |
| Kiwanis | 14.9 | 17.2 | 86.6 | 78.4 |
| Lion (10X) | 3.7 | 3.8 | 19.9 | 19.4 |
| Rotarian | 14.6 | 12.1 | 81.1 | 64.6 |
| V.F.W. (11X) | 27.0 | 22.8 | 134.3 | 147.1 |
| **Total Group** | **74.3** | **66.8** | **402.2** | **385.2** |
| **% change** | **11.3%** | | **4.4%** | |
| **■ General** | | | | |
| American Health (10X) C. | 32.2 | 63.3 | 243.5 | 319.9 |
| American Heritage (8X) C. | 49.2 | 48.5 | 162.5 | 174.8 |
| American Legion | 31.9 | 29.2 | 187.1 | 178.4 |
| American West (6X) | 17.7 | 29.0 | 69.5 | 104.6 |
| Art & Antiques (10X) C. | 85.7 | 88.9 | 381.3 | 348.7 |
| ARTnews (10X) | 149.3 | 110.0 | 604.7 | 573.0 |
| The Atlantic A. C. | 61.7 | 47.5 | 268.7 | 271.9 |
| Bon Appetit A. C. | 103.2 | 86.4 | 453.9 | 402.0 |
| Cable Guide C. | 28.0 | 40.9 | 145.9 | 179.2 |
| Changing Times C. | 59.5 | 49.4 | 277.4 | 277.7 |
| Conde Nast Traveler C. | 90.2 | 76.7 | 457.9 | 389.9 |
| Connoisseur C. | 72.4 | 95.4 | 310.5 | 399.3 |
| Consumers Digest (6X) C. | 34.1 | 27.0 | 82.2 | 77.4 |
| Cooking Light C. | 52.9 | 41.4 | 184.4 | 153.6 |
| Ebony C. | 107.4 | 128.9 | 477.4 | 509.7 |
| European Travel & Life (10X) C. | 50.4 | 51.6 | 220.8 | 199.6 |
| Food & Wine C. | 81.8 | 67.5 | 295.4 | 300.4 |
| Games (6X) C. | — | 23.6 | 34.1 | 50.6 |
| Golden Years (6X) | 34.2 | 35.4 | 108.2 | 161.3 |
| Gourmet C. | 130.7 | 122.0 | 527.5 | 495.5 |
| Harper's Magazine A. C. | 28.5 | 24.4 | 151.5 | 158.7 |
| Harrowsmith (6X) | 49.7 | 50.4 | 154.1 | 174.2 |
| Islands (6X) | 74.0 | 76.2 | 186.5 | 196.9 |
| Let's Live | 49.0 | 45.0 | 250.0 | 232.0 |
| Life C. | 118.2 | 73.9 | 296.3 | 356.2 |
| Longevity C. | 40.0 | 26.5 | 161.2 | 79.7 |
| Modern Maturity (6X) C. | — | — | 76.9 | 83.3 |
| Money C. | 111.8 | 108.8 | 512.8 | 513.4 |
| Mother Earth News C. | 55.7 | 79.5 | 202.5 | 242.0 |
| National Geographic C. | 23.5 | 22.2 | 121.2 | 107.7 |
| National Geographic Traveler (6X) C. | 58.6 | 40.6 | 157.6 | 103.4 |
| Natural History C. | 49.5 | 30.4 | 233.5 | 226.9 |
| New Choices C. | 27.1 | 34.2 | 153.3 | 187.1 |
| Prevention C. | 44.0 | 58.6 | 255.5 | 283.4 |
| Reader's Digest A. C. | 119.7 | 117.3 | 470.2 | 457.9 |
| Saturday Evening Post (9X) C. | 33.1 | 43.0 | 147.0 | 178.6 |
| Smithsonian C. | 80.4 | 80.1 | 412.5 | 430.7 |
| Town & Country C. | 135.9 | 160.2 | 628.4 | 644.9 |
| Travel-Holiday C. | 38.6 | 38.2 | 211.1 | 212.8 |
| Travel & Leisure C. | 120.4 | 133.0 | 620.4 | 674.0 |
| Travelhost | 1,274.3 | 1,293.0 | 6,258.0 | 6,224.1 |
| Vanity Fair C. | 93.7 | 129.2 | 539.7 | 541.5 |
| Yankee C. | 57.8 | 62.3 | 315.6 | 323.3 |
| **Total Group** | **3,955.9** | **3,989.5** | **18,008.6** | **18,200.2** |
| **% change** | **-0.8%** | | **-1.1%** | |
| **■ Home** | | | | |
| Americana (6X) | 13.2 | 17.7 | 34.8 | 63.6 |
| Architectural Digest A. C. | 158.6 | 213.8 | 738.7 | 763.8 |
| Better Homes & Gardens C. | 148.6 | 143.4 | 527.8 | 599.7 |
| Colonial Homes (6X) C. | — | — | 98.3 | 124.3 |
| Columbus Monthly-Homes (4X) | — | — | 57.2 | 60.9 |
| Country Home (6X) C. | — | — | 114.4 | 157.1 |
| Country Living C. | 98.0 | 105.4 | 454.2 | 490.1 |
| Family Handyman (10X) A. C. | 56.6 | 59.7 | 184.2 | 242.7 |
| Florida Home & Garden | 55.7 | 74.5 | 330.6 | 440.4 |
| Flower & Garden (5X) C. | 39.9 | 34.1 | 134.1 | 144.7 |
| Home C. | 64.6 | 59.6 | 296.7 | 301.0 |
| Home Mechanix C. | 68.3 | 59.4 | 235.5 | 268.3 |
| Homeowner (10X) C. | 28.5 | 33.6 | 125.4 | 147.0 |
| Horticulture | 59.7 | 50.0 | 247.9 | 227.5 |
| House Beautiful C. | 76.3 | 74.5 | 312.7 | 331.9 |
| House & Garden C. | 105.8 | 99.9 | 452.7 | 382.9 |
| Metropolis | 97.7 | 104.8 | 262.6 | 305.4 |
| Metropolitan Home C. | 94.4 | 152.1 | 514.1 | 539.6 |
| Midwest Living C. | — | — | 128.5 | 136.6 |
| 1,001 Home Ideas C. | 71.2 | 61.2 | 314.0 | 286.1 |
| Organic Gardening (10X) C. | 45.4 | 32.4 | 230.3 | 231.1 |
| Phoenix Home/Garden | 72.2 | 72.5 | 358.1 | 371.7 |
| Practical Home-owner (9X) C. | — | — | 157.8 | 98.1 |
| San Diego Home/Garden | 118.3 | 120.4 | 382.7 | 385.7 |
| Southern Accents (6X) C. | 91.4 | 131.9 | 326.6 | 330.6 |
| Southern Living C. | 114.2 | 119.8 | 549.5 | 595.0 |
| Sunset Magazine A. C. | 163.9 | 176.7 | 651.2 | 690.6 |
| Workbench (6X) | 42.5 | 44.2 | 111.4 | 136.7 |
| **Total Group** | **1,884.9** | **2,041.7** | **8,331.9** | **8,952.9** |
| **% change** | **-7.7%** | | **-5.9%** | |
| **■ In-flight & other passenger** | | | | |
| Aboard Group (6X) | 45.2 | 37.2 | 122.7 | 108.3 |
| Air Group One: | | | | |
| Delta Sky C. | 71.7 | 75.2 | 357.5 | 385.5 |
| TWA Ambassador B. | 41.3 | — | 197.5 | — |
| Alaska Airlines | 74.7 | 60.0 | 336.0 | 298.6 |
| America West Airlines (6X) | — | — | 300.0 | 259.2 |
| American Way (24X) C. | 180.6 | 151.3 | 720.9 | 749.9 |
| East/West Network: | | | | |
| Continental Profiles | 56.6 | 59.1 | 263.7 | 311.5 |
| Eastern Review | 31.0 | 62.8 | 161.4 | 265.9 |
| Pan Am Clipper | 51.8 | 50.1 | 237.7 | 233.7 |
| Southwest Spirit | 65.3 | 63.8 | 260.6 | 334.4 |
| Vis `A Vis | 72.6 | 84.0 | 344.8 | 431.4 |
| Pace Communications: | | | | |
| US Air Magazine | 69.7 | 69.9 | 303.2 | 280.2 |
| Spirit of Aloha | 31.9 | 22.4 | 168.3 | 96.4 |
| **Total Group** | **751.1** | **735.7** | **3,576.7** | **3,755.0** |
| **% change** | **2.1%** | | **-4.7%** | |
| **■ Men's** | | | | |
| Esquire A. C. | 100.6 | 106.2 | 488.1 | 496.7 |
| Firehouse Magazine | 20.7 | 37.5 | 161.5 | 176.0 |
| Gentlemen's Quarterly A. C. | 143.4 | 169.6 | 765.2 | 835.7 |
| M Magazine C. | 40.8 | 43.7 | 308.4 | 337.1 |
| Men's Health (6X) | 27.9 | — | 52.2 | — |
| Muscle & Fitness C. | 105.3 | 127.7 | 522.3 | 677.9 |
| Penthouse A. C. | 49.4 | 49.9 | 255.8 | 244.6 |
| Playboy A. C. | 62.3 | 67.1 | 285.3 | 315.7 |
| Salute (10X) | 47.3 | 30.5 | 179.9 | 108.8 |
| **Total Group** | **597.7** | **632.2** | **3,018.7** | **3,192.5** |
| **% change** | **-5.5%** | | **-5.4%** | |
| **■ Metropolitan** | | | | |
| Aloha (6X) | 46.8 | 30.2 | 134.6 | 87.0 |
| Atlanta | 79.2 | 71.3 | 345.8 | 316.0 |
| Baltimore | 67.0 | 89.3 | 310.7 | 342.4 |
| Boston | 115.3 | 138.4 | 512.3 | 662.1 |
| California C. | 86.1 | 69.7 | 333.2 | 296.9 |
| Chicago | 99.7 | 128.0 | 455.0 | 562.3 |
| Chicago's North Shore | 105.0 | 115.8 | 456.6 | 500.4 |
| Cincinnati | 35.9 | 41.9 | 189.2 | 232.2 |
| Cleveland | 51.7 | 74.9 | 219.1 | 278.8 |
| Columbus Monthly | 51.2 | 63.8 | 293.9 | 334.6 |
| Connecticut | 98.0 | 102.3 | 448.2 | 513.4 |
| D/Magazine | 59.5 | 70.8 | 276.0 | 348.9 |
| Detroit Monthly | 59.2 | 51.9 | 281.9 | 268.9 |
| Grand Rapids | 32.7 | 32.7 | 141.8 | 170.0 |
| Honolulu | 50.4 | 54.9 | 254.7 | 249.9 |
| Houston Metropolitan Magazine | 79.0 | 87.6 | 319.9 | 286.1 |
| Inside Chicago (8X) | 31.3 | 45.8 | 87.6 | 122.8 |
| Los Angeles | 188.4 | 180.9 | 676.4 | 756.5 |
| Louisiana Life (6X) | 32.7 | 34.2 | 90.0 | 67.4 |
| Madison | 46.0 | 45.0 | 195.0 | 208.0 |
| Memphis | 51.0 | 68.0 | 258.1 | 326.0 |
| Mid Atlantic Country | 53.8 | 50.6 | 223.6 | 191.5 |
| Milwaukee | 64.2 | 64.8 | 294.7 | 267.5 |
| Minneapolis/St. Paul | 97.1 | 108.4 | 523.8 | 548.1 |
| Minnesota Monthly Mag. | 89.7 | 45.3 | 339.8 | 219.6 |
| Nashville | 15.4 | 24.5 | 65.6 | 127.8 |
| New England Monthly | 44.0 | 51.1 | 191.4 | 255.5 |
| New Jersey Monthly | 74.7 | 100.3 | 342.7 | 442.7 |
| New Mexico | 43.9 | 44.0 | 211.5 | 222.2 |
| Ohio | 81.6 | 65.9 | 266.7 | 253.1 |
| Orlando | 82.0 | 96.0 | 478.7 | 473.7 |
| Pacific Northwest | 51.5 | 54.9 | 247.3 | 246.9 |
| Palm Beach Life | 41.1 | 47.3 | 392.7 | 434.8 |
| Palm Springs Life | 96.5 | 97.5 | 690.9 | 715.4 |
| Philadelphia | 131.8 | 135.3 | 624.9 | 674.6 |
| Phoenix | 29.9 | 44.9 | 189.8 | 260.1 |
| Pittsburgh | 68.0 | 63.3 | 316.1 | 302.5 |
| Rhode Island Monthly | 82.6 | 61.6 | 285.3 | 256.4 |
| Sacramento Magazine | 47.7 | 51.4 | 272.9 | 257.1 |
| St. Louis | 31.3 | 30.4 | 227.0 | 208.0 |
| San Diego | 140.0 | 149.4 | 638.6 | 647.2 |
| San Francisco Focus C. | 117.4 | 124.8 | 477.2 | 519.0 |
| Sarasota | 71.0 | 67.0 | 476.0 | 478.0 |
| South Florida Magazine | 73.1 | 94.0 | 460.2 | 563.9 |
| Texas Monthly C. | 139.3 | 133.6 | 568.4 | 528.8 |
| Ultra | 102.4 | 42.2 | 229.4 | 221.2 |
| The Virginian (6X) | — | — | 46.0 | 88.0 |
| Washington (10X) | 41.9 | 88.0 | 141.9 | 233.0 |
| Washington-Dossier | 37.4 | 34.7 | 197.9 | 177.1 |
| The Washingtonian | 153.0 | 181.0 | 668.6 | 844.2 |
| **Total Group** | **3,588.4** | **3,749.5** | **16,368.5** | **17,808.6** |
| **% change** | **-4.8%** | | **-7.0%** | |
| **■ Music/entertainment** | | | | |
| Audio | 96.8 | 97.2 | 422.6 | 455.7 |
| Dance Magazine | 61.1 | 66.8 | 317.7 | 304.8 |
| Playbill | 67.1 | 55.0 | 237.1 | 254.0 |
| Video Magazine | 62.3 | 58.0 | 335.7 | 294.1 |
| **Total Group** | **287.3** | **276.9** | **1,313.1** | **1,308.6** |
| **% change** | **3.8%** | | **0.3%** | |
| **■ Outdoor & sport** | | | | |
| Alaska | 39.2 | 44.5 | 213.2 | 217.3 |
| The American Handgunner (6X) | 59.0 | 50.0 | 172.0 | 155.0 |
| American Hunter | 12.6 | 14.8 | 83.7 | 83.5 |
| American Rifleman | 22.9 | 18.1 | 108.3 | 106.6 |
| Backpacker (7X) C. | 40.0 | 43.8 | 105.4 | 93.0 |
| Bass Master (10X) A. C. | 73.1 | 72.6 | 392.7 | 475.0 |
| Bicycling (9X) C. | 147.2 | 150.5 | 496.3 | 531.7 |
| Cross Country Skier (5X) | — | — | 73.6 | 70.5 |
| Ducks Unlimited (6X) | 27.6 | 22.0 | 77.2 | 73.7 |
| Field & Stream C. | 71.6 | 108.5 | 363.8 | 450.8 |
| Fishing World (6X) | 33.9 | 38.9 | 161.8 | 152.5 |
| Florida Sportsman | 120.1 | 130.4 | 717.6 | 738.4 |
| Golf Digest C. | 123.7 | 133.6 | 600.4 | 611.0 |
| Golf Illustrated C. | 51.0 | 44.7 | 230.8 | 220.4 |
| Golf Magazine C. | 93.6 | 117.8 | 584.3 | 678.1 |
| Gun Dog (6X) | 43.1 | 48.1 | 119.3 | 125.5 |
| Guns | 38.0 | 35.0 | 199.0 | 179.0 |
| Guns & Ammo | 43.4 | 36.9 | 228.2 | 218.2 |
| In-Fisherman (7X) | — | — | 322.5 | 389.5 |
| Outdoor Life C. | 70.9 | 101.9 | 340.5 | 463.7 |
| Outside Magazine | 85.6 | 88.3 | 323.5 | 326.1 |
| Petersen's Hunting | 41.5 | 35.2 | 177.0 | 196.6 |
| Runner's World (12X) C. | 39.1 | 45.8 | 163.8 | 190.4 |
| Salt Water Sportsman C. | 103.0 | 113.2 | 576.9 | 720.0 |
| Shooting Times | 28.4 | 24.9 | 152.5 | 154.4 |
| Sierra (6X) | 43.0 | 47.4 | 112.5 | 144.3 |
| Ski (8X) A. C. | — | — | 292.8 | 336.4 |
| Skiing (7X) A. C. | — | — | 230.0 | 216.4 |
| Skin Diver C. | 129.0 | 131.6 | 574.4 | 572.7 |
| Southern Outdoors (9X) | 37.1 | 33.7 | 230.1 | 296.4 |
| Southern Saltwater (8X) | 38.4 | 53.6 | 226.4 | 288.2 |
| Sport Magazine C. | 27.5 | 37.7 | 141.5 | 177.2 |
| Sports Afield C. | 57.7 | 54.0 | 339.9 | 361.4 |
| Surfing | 71.5 | 79.1 | 348.2 | 373.9 |
| Tennis C. | 61.0 | 80.4 | 291.2 | 337.2 |
| Waterski (9X) | 75.7 | 86.2 | 319.7 | 353.4 |
| Western Outdoors (10X) | — | 37.7 | 166.6 | 222.1 |
| Wildfowl (6X) | 15.5 | 16.9 | 57.3 | 47.5 |
| WindRider (8X) | 74.0 | 62.5 | 204.0 | 159.0 |
| Wing & Shot (6X) | 14.7 | 14.7 | 46.1 | 44.0 |
| World Tennis C. | 38.3 | 48.1 | 179.6 | 243.4 |
| **Total Group** | **2,091.7** | **2,302.6** | **10,744.7** | **11,794.4** |
| **% change** | **-9.2%** | | **-8.9%** | |
| **■ Photography** | | | | |
| American Photo (6X) C. | 57.1 | 35.2 | 143.8 | 164.3 |
| Petersen's Photographic | 27.7 | 36.8 | 116.5 | 143.7 |
| Popular Photography C. | 98.8 | 79.5 | 495.7 | 400.2 |
| **Total Group** | **183.6** | **151.5** | **756.0** | **708.2** |
| **% change** | **21.2%** | | **6.8%** | |
| **■ Science/electronic/mech** | | | | |
| Discover C. | 33.6 | 38.0 | 179.9 | 200.7 |
| Home Office Computing C. | 36.7 | 50.8 | 243.6 | 236.9 |
| Omni C. | 53.5 | 56.7 | 263.6 | 301.6 |
| Personal Computing | 133.0 | 152.0 | 652.0 | 865.0 |
| Popular Mechanics C. | 85.2 | 132.4 | 341.7 | 441.0 |
| Popular Science C. | 84.7 | 110.8 | 320.7 | 451.0 |
| Scientific American C. | 51.3 | 49.0 | 189.7 | 209.4 |
| Spectrum C. | 55.0 | 50.4 | 262.0 | 298.1 |
| **Total Group** | **533.0** | **640.0** | **2,453.2** | **3,003.6** |
| **% change** | **-16.7%** | | **-18.3%** | |
| **■ Woman/fashion/service** | | | | |
| Bride's Magazine (6X) A. C. | — | — | 1,295.0 | 1,227.1 |
| Cosmopolitan A. C. | 305.9 | 273.2 | 940.9 | 1,001.8 |
| Elle C. | 206.5 | 195.1 | 892.0 | 921.8 |
| Essence C. | 123.4 | 84.4 | 396.1 | 388.4 |
| Family Circle (17X) A. C. | 122.7 | 155.2 | 660.5 | 808.7 |
| Glamour C. | 197.6 | 198.8 | 750.8 | 834.7 |
| Good Housekeeping A. C. | 155.0 | 150.7 | 679.4 | 625.3 |
| Harper's Bazaar C. | 104.3 | 105.4 | 582.1 | 572.9 |
| Health C. | 35.1 | 32.0 | 179.1 | 158.2 |
| Imagen | 123.3 | 124.2 | 507.4 | 420.3 |
| Ladies' Home Journal C. | 150.9 | 164.2 | 649.0 | 653.2 |
| Lear's C. | 55.8 | 61.6 | 276.3 | 276.3 |
| Mademoiselle C. | 151.9 | 166.7 | 631.7 | 692.2 |
| McCall's C. | 98.4 | 122.9 | 404.0 | 468.1 |
| Military Lifestyle (10X) | 206.4 | 81.7 | 375.6 | 259.2 |
| Mirabella C. | 63.3 | — | 433.0 | — |
| Modern Bride (6X) C. | — | — | 1,025.2 | 972.1 |
| New Woman C. | 84.2 | 109.0 | 385.6 | 455.5 |
| Parents Magazine A. C. | 146.0 | 141.6 | 587.6 | 590.8 |
| Redbook C. | 105.3 | 113.3 | 464.3 | 463.9 |
| Savvy C. | 33.3 | 56.4 | 173.3 | 245.1 |
| Self C. | 155.0 | 144.5 | 565.0 | 570.7 |
| Seventeen C. | 97.8 | 124.8 | 547.2 | 559.9 |
| Shape C. | 69.6 | 76.5 | 268.7 | 331.8 |
| Soap Opera Digest (26X) C. | 45.8 | 52.5 | 181.5 | 195.0 |
| Soap Opera Update | 12.5 | 9.0 | 51.5 | 47.0 |
| Teen Magazine | 75.1 | 68.6 | 248.2 | 220.2 |
| True Story A. C. | 49.7 | 54.0 | 271.3 | 264.7 |
| Vogue C. | 201.9 | 255.5 | 1,201.9 | 1,360.4 |
| W Magazine (26X) C. | 66.6 | 90.4 | 596.3 | 634.9 |
| Weight Watchers C. | 31.5 | 32.7 | 182.1 | 173.3 |
| Woman (10X) C. | 28.9 | 36.2 | 124.3 | 150.7 |
| Woman's Day (15X) A. C. | 186.0 | 213.8 | 636.7 | 777.8 |
| Workbasket | 17.9 | 21.9 | 104.9 | 123.1 |
| Working Mother C. | 62.5 | 126.3 | 305.6 | 369.4 |
| Working Woman C. | 80.9 | 99.7 | 410.9 | 447.7 |
| **Total Group** | **3,650.9** | **3,744.8** | **17,985.1** | **18,262.1** |
| **% change** | **-2.5%** | | **-1.5%** | |
| **■ Youth** | | | | |
| Boys' Life C. | 17.3 | 13.8 | 91.1 | 91.5 |
| Campus Life (10X) | 26.7 | 23.4 | 204.5 | 214.0 |
| **Total Group** | **43.9** | **37.2** | **295.6** | **305.5** |
| **% change** | **18.1%** | | **-3.3%** | |
| **■ Business/national** | | | | |
| Barron's | 163.4 | 183.5 | 723.4 | 724.2 |
| Black Enterprise C. | 49.5 | 72.0 | 330.4 | 338.8 |
| Business Month C. | 40.3 | 36.9 | 177.8 | 164.0 |
| Business Week (52X) A. C. | 369.1 | 463.6 | 1,551.4 | 1,785.5 |
| Entrepreneur C. | 168.5 | 137.1 | 845.6 | 796.8 |
| Financial World (26X) C. | 109.8 | 73.0 | 465.8 | 329.4 |
| Forbes (26X) C. | 344.8 | 528.6 | 1,502.7 | 1,397.5 |
| Fortune (26X) C. | 292.8 | 229.6 | 1,245.6 | 1,218.3 |
| Frequent Flyer | 46.3 | 46.3 | 199.0 | 218.4 |
| Futures | 42.7 | 43.9 | 206.9 | 221.8 |
| Inc. Magazine C. | 132.7 | 102.5 | 441.7 | 479.8 |
| Income Opportunities | 71.6 | 72.8 | 315.1 | 344.3 |
| Industry Week (23X) A. | 83.9 | 108.3 | 437.5 | 433.9 |
| Nation's Business (12X) A. C. | 25.9 | 44.7 | 128.9 | 189.3 |
| **Total Group** | **1,941.3** | **2,142.8** | **8,571.7** | **8,612.2** |
| **% change** | **-9.4%** | | **-0.5%** | |
| **■ Business/regional** | | | | |
| Advantage-Nashville's Bus. Monthly | 22.6 | 39.7 | 112.3 | 168.5 |
| Bus. First of Buffalo | 67.8 | 78.6 | 325.7 | 376.2 |
| Bus. Jrnl.-Milwaukee | 154.3 | 158.4 | 588.3 | 622.5 |
| Bus. Jrnl.-Sacramento | 82.7 | 84.8 | 434.5 | 395.1 |
| Bus. North Carolina | 48.3 | 49.8 | 193.5 | 197.5 |
| Capital Dist. Bus. Review (52X) | 54.1 | 75.0 | 336.5 | 348.8 |
| Caribbean Business | 178.7 | 155.7 | 565.7 | 584.1 |
| Corporate Report Minnesota | 44.9 | 61.1 | 225.1 | 288.1 |
| Crain's Chicago Bus. (52X) | 162.5 | 177.4 | 698.6 | 692.7 |
| Crain's Cleveland Bus. (52X) | 91.1 | 108.1 | 383.1 | 388.5 |
| Crain's Detroit Bus. (52X) | 95.8 | 93.5 | 445.6 | 377.0 |
| Crain's New York Bus. (52X) | 81.7 | 70.0 | 329.5 | 278.0 |
| Florida Trend (13X) | 48.4 | 60.5 | 253.2 | 316.2 |
| Georgia Trend | 40.3 | 39.5 | 209.6 | 243.1 |
| Grand Rapids Bus. Jrnl. | 58.7 | 44.1 | 273.0 | 220.7 |
| Hawaii Business | 57.3 | 58.8 | 252.3 | 226.4 |
| Houston Bus. Jrnl. (52X) | 74.0 | 88.0 | 297.0 | 284.0 |
| Indianapolis Business Journal (52X) | 144.9 | 162.9 | 694.4 | 694.6 |
| Manhattan Inc. C. | 56.7 | 59.8 | 205.4 | 230.2 |
| New England Bus. (12X) A. | 31.0 | 41.3 | 166.8 | 220.6 |
| New Orleans City Bus. | 47.9 | 37.4 | 242.1 | 203.4 |
| Pacific Bus. News (52X) | 94.9 | 109.4 | 501.2 | 503.7 |
| Philadelphia Business Journal | 128.4 | 202.6 | 632.5 | 693.1 |
| Pittsburgh Business Times (52X) | 92.3 | 146.5 | 475.8 | 579.0 |
| Regardie's/Washington | 122.0 | 144.0 | 687.0 | 765.0 |
| St. Louis Bus. Jrnl. (52X) | 105.0 | 104.1 | 541.8 | 534.6 |
| Warfield's Monthly Baltimore | 79.2 | 92.0 | 310.1 | 332.0 |
| **Total Group** | **2,265.4** | **2,543.0** | **10,380.5** | **10,783.5** |
| **% change** | **-10.9%** | | **-3.8%** | |
| **■ National Sunday mags** | | | | |
| Parade (52X) C. | 73.3 | 70.0 | 286.7 | 303.9 |
| USA Weekend (52X) C. | 52.7 | 44.5 | 272.7 | 256.8 |
| Vista Magazine (52X) | 28.4 | 22.1 | 92.0 | 102.6 |
| **Total Group** | **154.4** | **136.6** | **651.4** | **663.3** |
| **% change** | **13.0%** | | **-1.8%** | |
| **■ Newspaper Sunday magazine** | | | | |
| Boston Globe | 171.9 | 212.3 | 879.8 | 1,037.5 |
| Chicago Tribune | 150.9 | 151.4 | 530.8 | 549.3 |
| Cleveland Plain Dealer | 71.3 | 79.1 | 301.9 | 331.4 |
| The Dallas Morning News | 53.3 | 62.5 | 257.9 | 327.8 |
| Detroit Free Press | 70.0 | 45.0 | 265.0 | 229.0 |
| L.A. Times C. | 78.1 | 116.6 | 429.6 | 538.7 |
| Louisville Courier-Jrnl. | 37.0 | 42.0 | 121.0 | 155.0 |
| New York Times Magazine C. | 340.7 | 292.2 | 1,602.9 | 1,624.0 |
| Philadelphia Inquirer | 100.9 | 94.1 | 458.3 | 455.1 |
| Seattle Times | 92.0 | 81.0 | 392.0 | 335.0 |
| St. Louis Post Dispatch | 81.6 | 80.6 | 377.6 | 415.9 |
| Toledo Blade Magazine | 33.5 | 30.2 | 171.5 | 163.0 |
| Washington Post | 146.1 | 160.7 | 552.6 | 693.4 |
| **Total Group** | **1,427.3** | **1,447.7** | **6,340.9** | **6,956.1** |
| **% change** | **-1.4%** | | **-7.5%** | |
| **■ Weeklies/bi-weeklies** | | | | |
| The Advocate (26X) | 125.3 | 143.6 | 642.6 | 754.1 |
| Army Times Military Group: Air Force Times (52X) | 156.5 | 179.8 | 760.9 | 783.8 |
| Army Times (52X) | 158.0 | 173.4 | 751.0 | 756.5 |
| Navy Times (52X) | 165.4 | 199.1 | 794.0 | 866.4 |
| Capper's (26X) | 28.6 | 21.0 | 156.4 | 174.7 |
| Commonweal (22X) | 10.5 | 9.0 | 55.2 | 45.8 |
| Golf World (40X) | 121.5 | 127.7 | 721.5 | 618.0 |
| Grit (52X) A. | 37.0 | 26.5 | 197.0 | 180.0 |
| National Journal (50X) C. | 60.0 | 53.0 | 282.8 | 312.0 |
| National Review (25X) | 27.2 | 29.5 | 130.1 | 125.1 |
| New Republic (48X) | 43.5 | 59.7 | 204.6 | 223.3 |
| New York Mag. (50X) C. | 219.3 | 325.8 | 1,051.0 | 1,219.1 |
| New Yorker C. | 168.9 | 201.3 | 910.8 | 859.0 |
| Newsweek (52X) A. C. | 213.1 | 289.5 | 902.8 | 1,027.9 |
| People (51X) C. | 366.6 | 471.5 | 1,428.3 | 1,588.0 |
| Rolling Stone (25X) C. | 213.8 | 177.6 | 766.1 | 764.4 |
| Sporting News (52X) C. | 37.6 | 51.7 | 215.9 | 245.4 |
| Sports Illustrated (52X) A. C. | 242.5 | 302.2 | 1,057.7 | 1,277.2 |
| Time (52X) A. C. | 252.8 | 316.6 | 1,054.2 | 1,148.1 |
| TV Guide (52X) A. C. | 253.9 | 255.6 | 1,287.5 | 1,482.9 |
| US Magazine (26X) C. | 84.0 | 95.7 | 309.3 | 303.1 |
| U.S. News & World Report (50X) A. C. | 182.6 | 195.4 | 744.3 | 791.7 |
| **Total Group** | **3,148.5** | **3,706.0** | **14,424.0** | **15,536.6** |
| **% change** | **-15.0%** | | **-7.1%** | |

NOTES: Linage is given in paid ad pages. (X) represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions. B. Incomplete report not included in group total and % change. C. Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. Ad Age makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Katie Welybi.

# Tide ad recall sprouts with help of Earth Day

**By Kate Fitzgerald**

Procter & Gamble Co.'s Tide detergent flowed back into the list of the 10 best-recalled ads last month on the strength of heavier overall advertising and promotions.

Tide shared the No. 10 spot (its first top 10 appearance since November) with Chrysler in *Advertising Age's* AdWatch poll for May.

Tide scored high thanks to a heavier print ad schedule in women's magazines, new TV executions and several special promotions including one tied to Earth Day on April 22.

That promotion, part of P&G's "Keep America Beautiful" campaign, incorporated a free standing insert underscoring P&G's commitment to the environment, such as Tide powder detergent boxes made of 100% recycled paper.

P&G also ran another promotion for the "Pro Bass Sweepstakes" in May, for both its Tide and Bold brands. Saatchi & Saatchi, New York, handles.

First place in the unaided-recall race went to Coca-Cola, which pushed rival Pepsi-Cola back to the No. 2 spot in the ongoing duel for cola dominance.

Ford maintained its spot among the top three for the fifth consecutive month, finishing No. 3 in May. Anheuser-Busch's Budweiser and Chevrolet tied for fourth.

McDonald's held steady in the No. 6 spot, while Nike tiptoed down the charts to No. 9, behind Toyota at No. 8.

Gone from the top 10 in May was Infiniti, which fell not quite to infinity but to No. 14 last month from No. 10 in April.

AT&T moved up one notch to No. 7 in its second month back in the top 10, after its TV and print blitz to launch the new Universal credit card broke last March. Lord Einstein O'Neill & Partners, New York, created the campaign in partnership with Young & Rubicam.

In aided awareness, H.J. Heinz Co.'s 9 Lives reappeared in the **pet food** category in the No. 5 spot, due to the popularity of its 15-second TV spot for 9 Lives Kitten Dinners. The commercial features kittens making human baby sounds, ending with a burp. Leo Burnett USA, Chicago, handles.

AdWatch is a joint project of *Ad Age* and the Gallup Organization. Advertising awareness is measured by asking a nationally projectable sample to name the first advertising that comes to mind from all seen, heard or read in the previous 30 days.

Last month, 1,000 adults were polled by phone. The margin of error is plus or minus 3.1%. □

## AdWatch survey of advertising awareness Top 10 in May

Each month, 1,000 people were asked: Of all the advertising you have seen, heard or read in the past 30 days, which advertising first comes to mind? Source: Gallup Organization, Lincoln, Neb.

| Rank 5/90 | Rank 4/90 | Advertiser | Agency |
|---|---|---|---|
| 1 | 2* | Coca-Cola | McCann-Erickson Worldwide |
| 2 | 1 | Pepsi-Cola | BBDO Worldwide |
| 3 | 2* | Ford | J. Walter Thompson USA |
| 4 | 5 | Budweiser/Bud Light | D'Arcy Masius Benton & Bowles/DDB Needham Worldwide |
| 4 | 4 | Chevrolet | Lintas:Campbell-Ewald |
| 6 | 6* | McDonald's | Leo Burnett USA |
| 7 | 8* | AT&T | N W Ayer/Ogilvy & Mather/Young & Rubicam |
| 8 | 8* | Toyota | Saatchi & Saatchi DFS/Pacific |
| 9 | 6* | Nike | Wieden & Kennedy |
| 10* | 10* | Chrysler | Bozell |
| 10* | — | Tide | Saatchi & Saatchi Advertising |

*Indicates tie.

**Maximum Exposure at the Lowest CPM**
Select Official State Game Regulation Books
Now Available for Targeted Advertising
CALL: Mr. Meyers
**1-800-343-9783**
**The Blackford Company**
Official Publishers of Over 8 Million State Hunting and Fishing Regulation Pamphlets Annually.

# Cleaning up at Clios

## BBDO wins 5; Riney gets best nat'l campaign

**By Jon Lafayette**

NEW YORK—BBDO Worldwide was the big winner at the 31st annual Clio Awards show here last week.

The agency took five Clios: for its Pizza Hut spot called "Right Field," a Diet Pepsi spot titled "Missing Link," "Excuses" for General Electric Co. and "Entrepreneur" for Apple Computer. In addition to winning the retail food category, the Pizza Hut spot also won for new adaptations of music.

Hal Riney & Partners, San Francisco, won the best national campaign Clio for its Stroh's Light spots.

American Honda Motor Co.'s "Art Gallery" spot by Rubin Postaer & Associates, Los Angeles, won three Clios, for automotive, special effects and original scoring.

Other agencies winning multiple Clios included HDM for Lea & Perrins steak sauce ("Rifle") and Mita Copiers ("Flip Card Man"); Korey, Kay & Partners for apparel marketer Members Only and the Tri-Honda Dealers Association ("First Sale"); Goodby, Berlin & Silverstein, San Francisco, for the University of California("125 Years & Still No Sports") and the Oakland Society for the Prevention of Cruelty to Animals ("Toby"); Fallon McElligott, Minneapolis, for Timex Corp. ("Psychic") and KRIV-TV, Dallas ("Weather Watch"); and Leo Burnett USA, Chicago, for Prell ("Baseball") and Glad Lock plastic bags ("Angry Bees").

Other winners included: Goldsmith/Jeffrey, best local cable spot; Wieden & Kennedy, Portland, Ore., best apparel spot for Nike; Cliff Freeman & Partners, entertainment promotion Clio for Home Box Office; Ammirati & Puris, retail services Clio for a United Parcel Service spot; and the now defunct New York office of Keye/Donna/Pearlstein, a media promotion-print Clio for a spot for *Playboy*.

**Riney wins again for its pseudo-Stroh's pitchmen.**

In the international competition, Simons Palmer Denton Clemmow & Johnson, London, won three Clios—automotive, cinematography and editing—for one spot for Samson Car Batteries. TBWA, London, won best TV campaign for the Opticians Association.

The winners were chosen from 25,490 entries from 59 countries. □

ON-SCREEN ENTERTAINMENT. NOW PLAYING TO SOLD-OUT THEATRES EVERYWHERE.

Movie houses are packed with *your* customers in a way that transcends conventional demographics. Money to spend? To be sure. But at the movies, customers also are focused, receptive and close to where products are sold.

On-Screen Entertainment places your message next to today's biggest film stars, today's biggest boxoffice triumphs. Our innovative slide format is entertaining and simple -- and simply sells like no other national medium. Call National Cinema Network to find out how at 1-800-SCREEN-1. We're your ticket to the movies.

On-Screen ENTERTAINMENT.
NOW AT A THEATRE NEAR YOU.

## WPP's odious little phone number

**By Laurel Wentz**

LONDON—Once a year, WPP Group proves it's really a fun company by publishing a subtle joke in its annual report.

This year, the touch of humor is the line OLJ-x213, printed inconspicuously on the back cover of the annual report at the end of a list of stock market codes. WPP watchers know OLJ could only stand for Odious Little Jerk, David Ogilvy's sobriquet for WPP Group Chief Executive Martin Sorrell.

Mr. Ogilvy called Mr. Sorrell that last year when Mr. Sorrell made his successful bid to buy Ogilvy & Mather. Mr. Ogilvy has since become chairman of WPP Group and stopped referring to his new employer in that manner.

Mr. Sorrell's direct extension at WPP headquarters is number 213. □

# Cannes fest

*(Continued from Page 1)*

& Warren's Excellent Ad Venture, Portland, Ore., for the Portland International Film Festival, a woman is shown eating disgusting food such as giant beetles and raw dogmeat. In W.B. Doner & Co.'s "Baltimore's Other Major League Team" spot for Baltimore Symphony Orchestra, fans, musicians and athletes comment on the BSO as if it were a baseball team. Doner's Baltimore office created the spot.

A depressed ad market worldwide forced agencies and production companies to cut back this year on their usual lavish entertainment, villas and boats.

Although the overall number of spots entered rose 5.9% to 3,742 from 3,532 last year—and U.S. entries were up 1.8% to 831 from 816—17 of the 42 countries participating entered fewer spots.

Brazil was especially hard hit, with entries falling 78.4% to 37 from 171. The U.K. signed up 405 spots, down 0.2% from last year's 429, and France's entries were down 24.1% to 265 from 349.

There was confusion for several days about whether a Leo Burnett USA spot for Procter & Gamble Co.'s Prell shampoo was in the festival or out. Burnett tried to remove the spot in the belief P&G didn't want it to compete, sources said, then re-entered it when P&G didn't object.

In the commercial, male baseball players discuss split ends; a relief pitcher is sent in because the coach likes the highlights in his hair.

P&G pulled the spot from a U.S. test market because it considers Prell a woman's brand, though sources said Burnett is still urging wider airing.

The Screen Advertising World Association, the festival's organizer, voted during the week to back its U.S. member, Screenvision, in its fight against Walt Disney Co. and Warner Bros. ultimatums to U.S. theater owners to stop showing paid advertising before their movies.

The U.S. film studios haven't tried to ban commercials elsewhere, but association members said they believe that could happen.

"I'm afraid this will become a problem all over the world," association President Massimo Momigliano said.

The group's support will include financial help with legal fees, he said.

Screenvision President Terry Laughren said the Federal Trade Commission is studying the issue but hasn't decided whether to launch an official investigation into possible antitrust and free speech violations.

Agencies continuing to use Cannes for international meetings this year included Saatchi & Saatchi Advertising, RSCG and DDB Needham Worldwide.

DDB Needham's two-day meeting included talks about bringing to Europe the "guaranteed results" compensation program the New York-based agency is trying in the U.S.

"What we're doing is thoroughly evaluating the possibility of the guarantee in Europe," said David Fernley, the agency's VP-Europe. He said the guarantee could be offered to clients in Europe by yearend.

Herve Brossard, chairman-creative director of DDB Needham France, Paris, said his office has been testing the guarantee program with one client since the beginning of the year.

This year's top fashion accessory —the male ponytail—was sported by jury president Tim Mellors, executive creative director of Publicis U.K., London, and South African judge Robyn Putter, executive creative director and chairman of Ogilvy & Mather Rightford Searle-Tripp & Makin, Cape Town. The look also was popular among many young admen at the all-night bar at the Martinez, the serious party-goers' hotel.

The jury of 22 judges from 15 countries gave many spots 0 to 3 on a scale to 10 during the 3 seconds they have to vote on each entry.

U.S. judge Rick Fizdale, president-chief creative officer of Leo Burnett Co., Chicago, said after watching almost 2,000 commercials: "I only gave three top marks—to Energizer, Nike and Maxell tapes."

The spots for Maxell (U.K.) feature people singing the wrong words to songs because they're not listening to a Maxell tape.

"The funny stuff goes down well because everybody gets so bored," said U.S. judge Mary Moore, vice chairman-chief creative officer of Wells, Rich, Greene/Worldwide, New York.

Another popular spot was Chanel's ad, created in-house, for Egoiste—French for "selfish"—men's cologne. In the commercial, a series of glamorous women throw open shuttered windows to shout "egoiste" at a man who has broken their hearts and mistreated them. □

# Judges boot copycat 'Bunny'

**By Laurel Wentz**

CANNES—In a shocking move, judges threw out early Grand Prix favorite Eveready Battery Co.'s "Bunny" campaign, on the grounds it wasn't original.

Early last week, the determined pink bunny captivated judges and attendees at the International Advertising Film Festival, making its commercials an early favorite for the Grand Prix.

But the European judges were quick to point out the campaign from Chiat/Day/Mojo, Venice, Calif., showing the bunny marching through fictitious TV spots, was similar in concept to a U.K. campaign for Bass' Carling Black Label beer.

Sources said the Bunny spots had enough points to win a Gold Lion, but the judges considered the basic idea of the spot unoriginal.

The Carling campaign, created by WCRS, London, four years ago, consisted of a series of spoof commercials in which two Carling Black Label spokesmen appeared at the end and said, "I bet he drinks Carling Black Label."

**Judges said the Energizer Bunny idea was derivative of this Carling Black Label spot—and threw it out of the competition.**

In one three-spots-in-one commercial, a cowboy runs across a desert, has a beer in a Wild West saloon and takes off on horseback pursued by bad guys. The camera then switches to a parody ad for an album of love songs and the cowboy soon canters across the screen. The scene then shifts to a supermarket where two housewives are discussing detergents when the cowboy rides through the store.

At the end of the spot is the beer's long-running slogan, used to describe anyone who does something unusual: "I bet he drinks Carling Black Label."

"I'm somewhat disappointed Energizer is ripping off Carling Black Label. While it could win a Gold, I don't know if in all conscience I could vote for it for the Grand Prix," one judge said earlier in the week.

The 4,000 Cannes delegates would probably have voted differently. When the short-list spots were screened Friday to a packed auditorium, the audience applauded enthusiastically throughout the two Energizer commercials.

Sources said Chiat was aware of the Carling Black Label campaign before it entered three "Bunny" spots at Cannes. In the spots, the bunny marches through spoof commercials for coffee, nasal spray, greatest-hits records and Alarm soap. □

# Upfront

*(Continued from Page 1)*

said Lou Schultz, exec VP-director of media services for Lintas:USA, New York.

"One automaker is up and the other is down. Total [auto] spending is flat," an agency source said. "Autos simply won't drive the upfront this year. But entertainment companies are up and package goods are up. It will make for a bigger upfront marketplace, but it won't do to the market what the autos did last year."

Arthur Kesteloot, manager-advertising and media relations for Chrysler Corp., said the No. 3 domestic automaker "consciously went into the upfront market with less money than a year ago" because of expected price increases.

He wouldn't specify how much money was pulled from the network budget but said the money saved would go to cable TV and other media.

General Motors Corp., by making a three-year, $500 million to $750 million deal with NBC for prime-time, sports and cable in early May, helped calm the automotive spending spree.

But that deal did help ABC and CBS command CPM increases of between 14% and 20%.

Automotive buyers had hoped to keep costs down this year, but because GM had already locked up preferred positions in desired programs on NBC, the rivals flocked to the other networks and drove prices skyward despite reduced overall spending.

Although the furor over ratings guarantees apparently died down when ABC, CBS and NBC adopted a uniform viewer-counting plan to reduce liability for advertiser make-goods (AA, June 18), buyers said the issue remains part of the negotiation process.

Still, the flap over ratings guarantees has apparently benefited syndication and cable TV.

Barter syndicators now expect to reap $1.2 billion in upfront sales this year, up 20%, while cable TV is predicting at least a 50% increase to $750 million to $800 million in upfront sales.

"The turmoil in network television pricing and ratings guarantee strategies really fueled the barter syndication upfront," said Karl Kuechenmeister, senior VP, Warner Bros. Media Sales. "Advertisers wanted to protect themselves from getting hurt in the network upfront. We're close to being done now."

Campbell Soup Co. will put "a lot more money than anticipated" into syndication this year because of the network guarantee situation, said Paul Mulcahy, VP-advertising. But he also said his company couldn't afford to abandon network TV entirely, a refrain heard from many advertiser and agency executives because of what the alternatives were.

"Major syndicators tried to package too much garbage with the good stuff," said Jon Mandel, senior VP-director of national broadcast for Grey Advertising. "They've got clearance, scheduling and other unknowns to contend with. As a result, overall, syndication has been a relatively soft marketplace. Only a handful of top shows got really good increases. The rest of it was single-digit CPM increases." □

# Nets nix Eastern, Bart

## CBS rejects airline ads; ABC, NBC turn down BK

**By Jennifer Lawrence and Scott Hume**

The ad careers of Martin Shugrue, Eastern Airlines' court-appointed trustee, and the animated Simpson family have hit snags with the Big 3 TV networks.

Four Eastern commercials featuring Mr. Shugrue have been shut out of ad time on CBS news programming in their current form.

The $10 million to $15 million campaign still broke June 17 as scheduled on ABC and NBC.

The spots show Mr. Shugrue at an employee meeting in an unscripted context.

The airline, operating under federal bankruptcy protection, and its agency, Ogilvy & Mather, New York, refused CBS' demand that the spots carry a corporate logo or the words "corporate message" during news programming.

"Our concern was that Mr. Shugrue was standing at a microphone at an employee conference that could be an actual news event," said Matthew Margo, VP-program practices, CBS/Broadcast Group. "CBS asked for a small but important change to put viewers on notice that it is a commercial."

Eastern and O&M had no objection to CBS' request that in network non-news programming, the spots should be preceded and followed by other commercials—or "podded"—to avoid viewer confusion. No logo or superimposition would be required.

Two new spots, filmed on an actual Eastern flight, focus on Mr. Shugrue talking with passengers.

CBS approved the first commercial in that series late last week and at press time hadn't seen the second spot.

In an interesting turn of events, CBS was the only one of the Big 3 networks that said last week it's willing to air upcoming TV spots for Burger King Co.'s promotional tie-ins with the Simpsons, the characters from the popular Fox Broadcasting Co. series of the same name.

Burger King has planned an August through October promotion with the characters. But ABC and NBC turned down TV spots even though no finished commercials have been submitted to them.

ABC said it would refuse to air any Burger King spots with the Simpsons because of a longs anding policy not to cross-promote competitors' shows.

The network has accepted spots that featured stars of competing TV shows but only when the actor isn't in character. While admitting the use of animated characters "is fuzzy," ABC said it believed the Burger King spots were a cross-promotion.

ABC is reviewing its policy at the fast-food chain's request, but sources at the network say they doubt the decision will be reversed.

NBC also said it would nix the Burger King spots, citing a similar policy. The network said the policy won't be reviewed.

CBS said it would accept the spots as long as the name of the Fox program isn't mentioned.

This could present a problem for the chain, because the media schedule sent to franchisees promised a total of 2,200 gross rating points of TV support for the three-pronged promotion.

Company sources put the TV budget at $15 million and total media spending at $20 million. Saatchi & Saatchi Advertising, New York, is the agency.

Franchisees have been stocking up on 32-ounce beverage cups for the first phase of the promotion, to run July 30 to Sept. 9.

A "Summer Vacation With the Simpsons" promotion with Simpson figurines is slated for Aug. 6 to Sept. 16, and a promotion involving posable Simpson dolls is set to run from Sept. 17 to Oct. 28.

Whether network TV spots for the promotions will run now is in question.

Burger King's official line last week was that it "has made no announcements concerning tie-ins with 'The Simpsons' and all reports are just speculation." □

*Wayne Walley contributed to this story.*